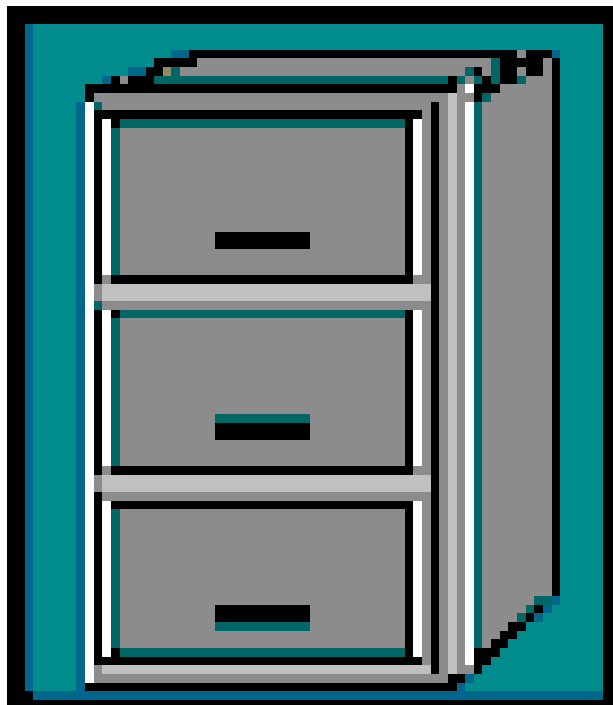# Operations Management

Arizona AIM System

State Agency User Manual
April 2005

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Chapter 8 - Operations Management

Capabilities

Purpose

The Operations Management functional area is intended to provide general support to WIC State, Local Agencies and Clinics by automating administrative tasks and reports at those sites. It captures contact information and statistics for Local Agencies and Clinics, and tracks various activities at those sites. This functional area also captures contact data for individuals and organizations that may be useful in outreach efforts to identify potential WIC participants.

General Description

Operations Management is made up of the following functions:

Monitor Administrative Operations

It is important for the AIM System to provide information about the regular operations at the Local Agencies including number of education classes given, number of participants added to the program, and the number of food instruments issued during each month. Other statistical information on the Local Agencies and Clinics, such as staffing levels and positions, participant-to-staff ratios, nutritionist-to-staff ratios, and cost per participant figures, will be available for analysis by State and Local Agencies. This data is helpful for improving participant service and clinic flow, and making funding decisions.

The AIM System is able to maintain Local Agency and Clinic information. This information is available to State and Local Agency staff on display windows and reports and describes the characteristics of Local Agencies and/or Clinics. A Local Agency's activity includes all aspects of the site's operations including certification and termination of WIC enrollees, provision of nutrition education, and issuance of food instruments. The AIM System provides individual reports to each of the Local Agencies and Clinics, and all of these reports are available to the State Agency upon request. Much of the activity information provided in these reports is captured and maintained by other functional areas within the overall AIM System.

Maintain Information on Local Agencies and Clinics

The AIM System supports this function by collecting and storing data about Local Agencies and Clinics. The System retrieves data to provide reports and display windows for a given Local Agency. The System allows users to maintain a database of information regarding the organizational structure of the WIC Program. All levels of one organization can be created and unified together into an organization structure. In Arizona WIC this means creating a State Agency, Local Agencies, and Clinics. The System reports on the Arizona WIC organization in the FCS648 format, which is acceptable as submission for federal reporting. Additionally, this function allows users to maintain the list of programs to which they refer participants as well as how a participant is referred to the WIC Program.

Produce Management Information Reports

The AIM System supports this function by retrieving data from various data stores to produce required management information reports and display windows. The System produces monthly activity reports at the Local Agency level (by Clinic and Local Agency summary), and a summary report at the State level.

Local Agency Operating Characteristics Reports

The System reports on selected agency operating characteristics using the latest data available. For example, the staff currently serving an organizational unit can be reported upon using the directory reporting function.

Another previously mentioned report, the on-demand "WIC Participant Status Report" described in the Caseload Management functionality may also be considered an Operations Management tool. It reports data affecting caseload decisions such as summaries of enrollees, applicants, categorical eligibility, wait-listed applicants and terminations. The System also reports on referrals to/from WIC.

Also using information from the Operations Management area, users can track the participant to staff ratio for evaluating staff effectiveness and program staffing levels.

Produce Agency Mailing Labels

The AIM System enables users to generate mailing labels for all Local Agencies in the organization. The labels are produced for correspondence sent to the Local Agency WIC coordinator.

Maintain Staff Data

The AIM System allows users to capture and maintain staff data and then assign the staff to the organizational unit that they support. This information is valuable in the Appointment Scheduling function as well as in the Operations Management area.

Staff members can be assigned to more than one organizational unit. In the Caseload Management area, the same staff data is used to report on staffing ratios versus actual and estimated caseload.

The ability to mark staff positions as vacant or pseudo is also available to aid in determining staffing levels and scheduling.

Maintain Organizational Units

The AIM System allows users to capture and maintain organizations of different types: State Agency, Local Agencies under State Agency, and Clinics under Local Agencies.

Maintain Outreach Organizations

The AIM System allows users to capture and maintain different types of outreach organizations such as: Health Maintenance Organizations, Breastfeeding Organizations, etc.

Maintain Programs

The AIM System promotes the capture and maintenance of information regarding outreach organizations and the programs that they provide. This information is particularly useful in targeting outreach efforts and referrals to/from these efforts.

The Operations Management function allows users to maintain information about the programs and funding sources used to support those programs. It is important to capture this information for production of the Local Agency Directory as well as in determining the programs that will be holding clinics into which participants are scheduled.

Maintain Outreach Organization Types

The AIM System maintains a database of State and Local Agencies who might be contacted for WIC outreach purposes. This database is used in the certification process to build the referrals "from/to" information. It is also used in helping the WIC Program determine the organizations that are most effective in building WIC Caseload.

Maintain Outreach Communication Type

The Operations Management function allows user to maintain information about the methods used to communicate with State and Local outreach organizations. This function is used to identify those methods.

Maintain Staff Titles

The Operations Management function allows users to maintain information about the staff member titles. This function is used to create and update staff titles.

Maintain Title Categories

The Operations Management function allows users to maintain information about the staff member title categories. This function is used to create and update title categories.

Track Communications By Local Agencies

The Operations Management function allows user to maintain information about the communications with State and Local outreach organizations. This function is used to track outreach organization communications.

Manage Participant Outreach

It is important for the AIM System to provide information about the State and Local Agencies that might be contacted for WIC outreach purposes. The Operations Management function enables users to capture and maintain data about outreach organizations, including contacts, referrals, and location information. It also provides reports of referrals mailing lists, and mailing labels.

Maintain Outreach Contact List for Local Agencies

The Operations Management function allows the user to maintain information about the State and Local Agencies that might be contacted for WIC outreach purposes. This information is used in the certification process to build the referrals "from/to" information. It will also be used in

helping the WIC Program determine the organizations that are most effective in building the WIC Caseload.

Track Referrals to Other Health and Social Services

The AIM System assists in determining where referrals come from and go to by providing appropriate reporting.

Produce Outreach Organization Mailing Labels

The AIM System enables users to generate mailing labels for outreach organizations tracked in the organizational unit and outreach organization data stores. Labels can be generated at the Local Agency as well as the State Agency.

Description of Operations Management Functions

Update Time Study Daily Log

The AIM System enables the user to capture and maintain individual staff member's activity
information in the following areas:
Participant Services
Nutrition Education
Breastfeeding
Administration
Immunization
CSFP
Tobacco
Other

Individual staff at the State or Local Agency level may enter their activity information that is then
combined with other salary and budget information to produce the time study report.

Update Annual WIC Cost Summary

The AIM System allows the user to generate the Annual Cost Summary report for his/her
organization unit utilizing the Time Study Daily Logs and additional salary and budget
information. The user may capture, display and maintain data for a Fiscal Year.

Description of Operations Management Functions

When clicking the Operations Management button from the AIM System Master Menu, the Operation Management main menu is displayed:
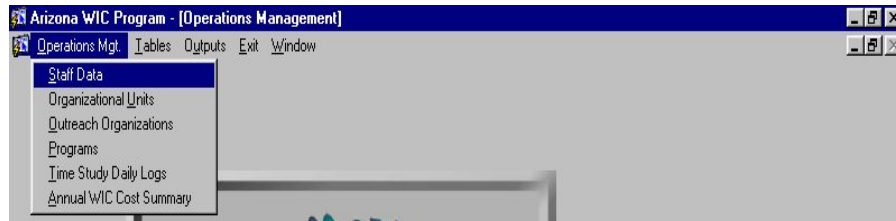

Figure 1 - Operations Management Splash Menu

Maintaining Staff Data

To Maintain Staff Data:

Click Operations Mgt from the menu bar.
Click Staff Data as shown below:

The Staff Data window is displayed:

Figure 2 –Staff Data (1 of 2)

Figure 3 – Staff Data (2 of 2)

Figure 4 - Staff Data (Phone Pop-up window)

Figure 5 – Staff Data (Language Pop-Up Window)

Figure 6 – Staff Data (Training Pop-Up Window)

Add a Staff Member

1. With the cursor in the Staff ID field, click the Insert Record icon on the toolbar. The System automatically assigns the next available ID number.
2. TAB to the Position # field and type in the Position ID for this staff member.

3. To indicate if the new position is Vacant, Pseudo, or Non-WIC, click the correct check box.
4. TAB to the Name fields and enter the staff person's last name, first name and middle initial. If the Vacant checkbox has been marked, the System automatically fills the name fields as "Vacant." The System displays the staff member's initials in the Initials field.
5. TAB to the Educational/Professional Suffix field and enter the staff person's educational or professional title, if desired.
6. TAB to the Local Agency Coordinator checkbox and mark as checked if this position is a Local Agency Coordinator.
7. TAB to the Street Address field and enter the address of where this staff person works.
8. TAB to the City field and enter the city or select it from the LOV. The System defaults the County, State and Zip Code fields based on the City.
9. Click the Phone push button to display the Phone pop-up window. Enter the Staff Member's phone information.
10. Click the OK button to save the data and return to the Staff Data window.
11. Click the Training push button to display the Training pop-up window.
12. Enter the Date the training session was conducted.
13. TAB to the Class Topic field and enter the name of the class.
14. TAB to the Location field and enter the location for this class.
15. TAB to the Duration field and enter the number of hours of training this class provided.
16. TAB to the Cost field and enter the dollar amount charged for this class, if applicable.
17. TAB to the In Service checkbox and mark as checked if this training was provided within the WIC Program.
18. TAB to the Out Service checkbox and mark as checked if this training course was not provided by the WIC Program.
19. TAB to the Nutr. Ed checkbox and mark as checked if this course provided training about nutrition education topics.
20. TAB to the Other checkbox and mark as checked if this course provided training about a topic other than nutrition education.
21. Use the VCR buttons on the toolbar to find other training records stored in the AIM System for this staff member.
22. Click the OK push button to save the training information entered and to return to the Staff Data window.
23. TAB to the E-mail field and enter this person's email address, if available.
24. TAB to the Comment field and enter any applicable comments, if desired.
25. Click the Language push button to display the Languages pop-up window.
26. Click the Primary LOV button and select the primary language for this staff member.
27. Click the Secondary LOV button and select a secondary language for this staff member, if applicable.
28. Click the OK button to close the pop-up and return to the Staff Data window.
29. In the Job Description section of the window, click the list of values button next to the Program field, to select the program to for this staff member. You must complete this line of data for every program where the staff person works. The System automatically displays the Description, Code and Organization fields corresponding to the Program ID selected.
30. TAB to the Title field and select the staff person's title from the LOV.
31. TAB to the Salary field and enter the hourly dollar salary paid to this staff member, if desired.
32. TAB to the ERE% field and enter the Employee Related Expenses percentage for this staff member.
33. TAB to the Start Date and enter the date the staff person began this job.
34. TAB to the Hrs/Wk field and enter the hours per week for which this position is budgeted. Based on the Hrs/Wk and the FTE Base, the AIM System calculates and displays the FTE.

35. TAB to the Home Org checkbox and mark as checked, if desired, to designate that the associated program and job as this staff person's primary job responsibility.
36. Click the Save icon to save the information.

Update a Staff Member's information (i.e. promotion)

1. Click the Enter Query icon.
2. Enter the Staff ID and/or Last Name, First Name fields. Then press the F8 key to execute the Query. The system displays the staff member information to be updated.
3. Close out any existing job descriptions by clicking once on the correct title/organization for that staff member.
4. Press the TAB key until the cursor reaches the End Date field, and enter the end date for this position, using the MM/DD/YYYY format.
5. Click once on an existing job description entry and click the Insert Record icon. This creates a new blank job description for completion.
6. Complete the Program, Title, Salary, ERE%, Start Date, Hrs/Wk and Home Org fields for this new position, as previously described for a new staff member.
7. Click the Save icon on the toolbar to save the updates.

Delete a Staff Member

1. Click the Enter Query icon.
2. Enter the Staff ID and/or Last Name, First Name fields. Then press the F8 key to execute the Query. The system displays the staff member information to be updated. Verify that this is the correct record to delete.
3. Click the Program field in the Job Description section. Then click the Remove Record icon. Repeat this process for each job description.
4. Click the Phone push button.
5. Click on a phone number and click the Remove Record icon. Repeat this procedure for each phone number listed. When all of the phone numbers have been removed, click the OK push button.
6. Click the Language push button and remove all Language data associated with this staff member. Click the OK push button to close the pop-up and return to the Staff Data window.
7. Click the Training push button and remove all Training data associated with this staff member. Click the OK push button to close the pop-up and return to the Staff Data window.
8. Click the Save icon to save deletion of the pop-up windows data.
9. Click the Staff ID number, and then click the Remove Record icon.
10. Click the Save icon to save deletion of the staff member.

Figure 2 –Staff Data (1 of 2)

Fields

Staff ID - The staff person's unique identification number. This field is system-generated.
Position # - A 10-digit Alphanumeric user-entered code that represents the position number for the staff member. This field is optional.
Last Name - The staff person's last name. This field is mandatory and is user-entered. If the Vacant check box is checked, this will default to VACANT.
First Name - The staff person's first name. This field is optional and is user-entered (except if the Vacant check box is checked).

MI1 - Staff person's middle first initial. This field is optional.
MI2 - Staff person's middle second initial. This field is optional.
Initials - The staff person's initials. This field is display only and is calculated from last name, first name, and middle initials.
Educational/Professional Suffix - The staff person's educational and professional title, such as Ph.D., MPH, etc. This field is optional and is user-entered.
Street Address - The street address of where the staff person works. This first line is mandatory while the second line is optional.
City - The city where the staff member works. This field can be entered manually or the user can select a value from the list of values. Selection of a city fills in the state, county, and zip code. For more information, refer to the Locales window in System Administration. This field is mandatory.
County - The county where the staff person works. This field is display only and is populated when a city or zip code is selected. This field is display only.
State - The state where the staff member works. This field is display only and is populated when a city or zip code is selected.
Zip Code - The zip code where the staff member works. This field can be entered in manually or the user can select a value from the list of values. Selection of a zip code fills in the city, county, and state. The additional four-digit code is user-entered. For more information, refer to the Zip Codes window in System Administration. The first field is mandatory and the second is optional.
E-Mail - The staff person's E-mail identification. This field is optional.
Comment - The user may provide any comments or remarks. This field is optional.
Program ID - Clicking on the list of values button allows the user to assign the staff member a program supported by a particular organization, such as WIC, CSFP, etc. For more information, refer to the Program Categories window. This field is mandatory.
Description -Name of the program category selected by the user in the Program ID field. This field is display only.
Code - The code number associated with a specific organization. This field is display only and is populated when Program ID is selected.
Organization - This field is display only and is populated when Program is selected.
Title - Clicking on the list of values button allows the user to assign the staff member a title, such as nutritionist. For more information, refer to the Maintain Staff Titles window. This field is mandatory.

Push Button(s)

Phone - Clicking this button allows the user to enter phone information.
Language - Clicking this button allows the user to enter primary and secondary language capabilities of the staff member.
Training - Clicking this button allows the user to enter information about training classes attended by the staff member.

Check Box(es)

Vacant - The Vacant checkbox is available to the user to indicate that the staff member position is vacant. If this box is checked, the last name and first name are set to "VACANT" by the System.
Pseudo - Used to create false staff member for scheduling purposes.
Non-WIC - This identifies a non-WIC staff member.
Local Agency Coordinator - If checked, the staff member is a Local Agency Coordinator.

Figure 3 – Staff Data (2 of 2)

Fields

Salary – The hourly dollar salary paid to this staff member. This field is optional.
ERE% - The Employee Related Expenses percentage. This field is optional.
Start Date - The date that the person started a particular job at that location. This field is mandatory.
End Date - The date that the person ended a particular job at that location. This field is optional.
Hrs/Wk - The hours /week that a person is normally scheduled to work. This field is mandatory.
FTE Base - The hours per week that a full time employee normally works at this Organization. Forty hours would be full time. Less than forty hours per week would be part time. This field is display only.
FTE – Displays in decimal format the hours per week divided by the FTE Base.

Check Box(es)

Home Org. - The job and organization that is the staff member's primary responsibility.

Figure 4 - Staff Data (Phone Pop-up window)

Fields

Phone - The staff person's work phone number, including area code. This field is optional.
Ext. - The staff person's work extension number, if applicable. This field is optional.
Phone Type - The type of telecommunications device this number represents. This field is optional.

Push Button(s)

OK - Clicking on this button saves the information entered and returns the user to the Staff Data window.

Figure 5 – Staff Data (Language Pop-Up Window)

Fields

Primary - Clicking the list of values button allows the user to select the primary language for the staff member. For more information, refer to the Maintain Languages window in Enrollment and Certification. This field is mandatory.
Secondary - Clicking the list of values button allows the user to select the secondary language for this staff member. For more information, refer to the Maintain Languages window in Enrollment and Certification. This field is optional.

Push Button(s)

OK - Clicking this button saves the information entered and returns the user to the Staff Data window.

Figure 6 – Staff Data (Training Pop-Up Window)

Fields

Date - The date the class was conducted. This optional field is user-entered.
Class Topic - The name of the class. This optional field is user-entered.
Location - The location of the class. This optional field is user-entered.
Instructor - The instructor's name. This optional field is user-entered.
Duration - The number of hours of training provided by the class. This field is optional.
Cost - The dollar value charged, if any, for the staff member to attend this training course. This field is optional.

Check Box(es)

In-Service - The user selects this checkbox if the training course was provided within the WIC Program.
Out-Service - The user selects this checkbox if the training course was provided outside of the WIC Program.
Nutr. Ed. - This checkbox is selected if the course provided training about nutrition education topics.
Other - This checkbox is selected if the course provided training about a topic other than nutrition education.

Push Button(s)

Next - Clicking this button allows the user to display the next training record stored in the system for this staff member. The system defaults to display the most recent training class when this window is first displayed.
Previous - Clicking this button allows the user to display the previous training record stored in the system for this staff member.
OK - Clicking this button saves the information entered and returns the user to the Staff Data window.
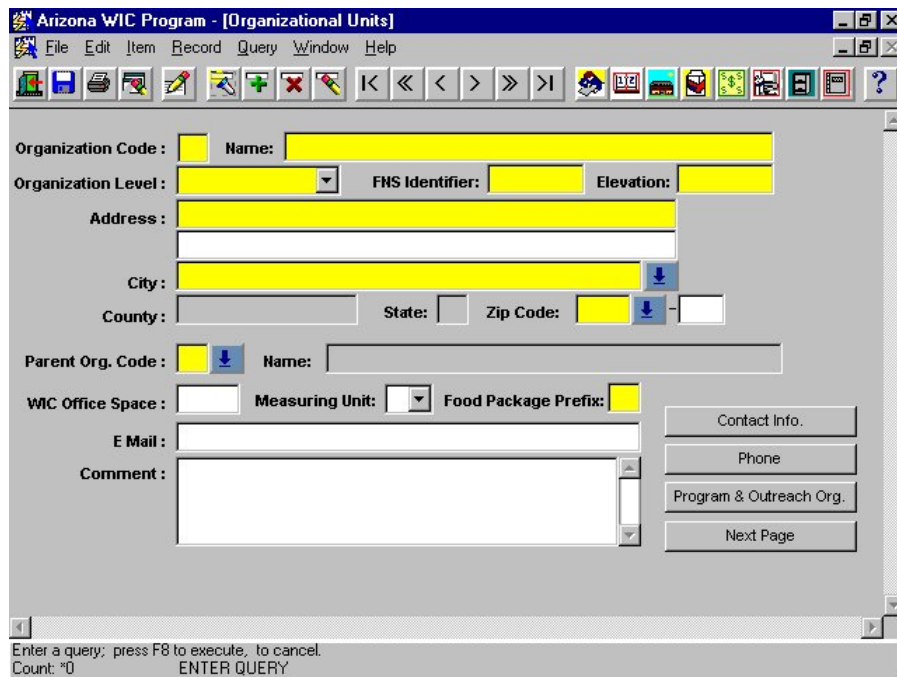
Maintaining Organizational Units

To Maintain Organizational Units:

1. Click Operations Mgt. on the Operations Management main menu.
2. Click Organizational Units as shown below:

The Organizational Units Window is displayed:

Figure 7 – Organizational Units

Add an Organizational Unit

1. Type in the Organization Code.
2. TAB to the Name field and type in the organization's name.
3. TAB to the Organization Level field and select the type of organization from the drop down list.
4. TAB to the FNS Identifier field and type in the identification number assigned by Food and Nutrition Services (FNS).
5. TAB to the Elevation field and enter the elevation (in feet above sea level) for the organizational unit.

6. TAB to the Address field and enter the address for the organization.
7. TAB to the City field and type in the city or select it from the LOV. The System defaults the County, State, and Zip Code fields based on the City.
8. TAB to the Parent Org. Code field and select the parent organization for this organization from the LOV. The AIM System displays the Name field for the parent organization once the Parent Org. Code field is selected.
9. TAB to the WIC Office Space field and enter the office space, in square feet, that is allocated for the WIC Program at this specific site.
10. TAB to the Measuring Unit and select the measurement unit (English or Metric) that is used at this location.
11. TAB to the Food Pattern Prefix field. The system will automatically assign a value to this field.
12. TAB to the E Mail field and type in the organization's e-mail address, if applicable.
13. TAB to the Comment field and enter any pertinent comments, if desired.
14. Click the Contact Info. push button to display the Contact Info pop-up window.
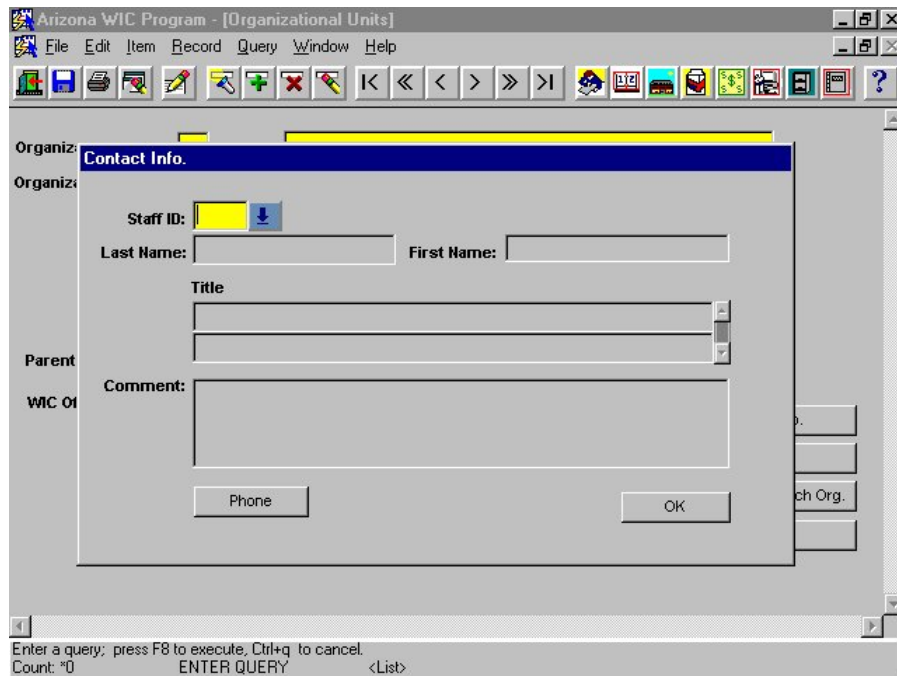

Figure 8 – Organizational Units (Contact Info Pop-Up Window)

15. Click the Staff ID LOV and select the identification number of the staff person who is designated as the contact for this organizational unit. The System displays the Last Name, First Name, Title, and Comment fields for the staff member once the Staff ID is selected.
16. Clicking the Phone push button allows you to view the phone information for this staff member. No phone information may be updated on this pop-up.
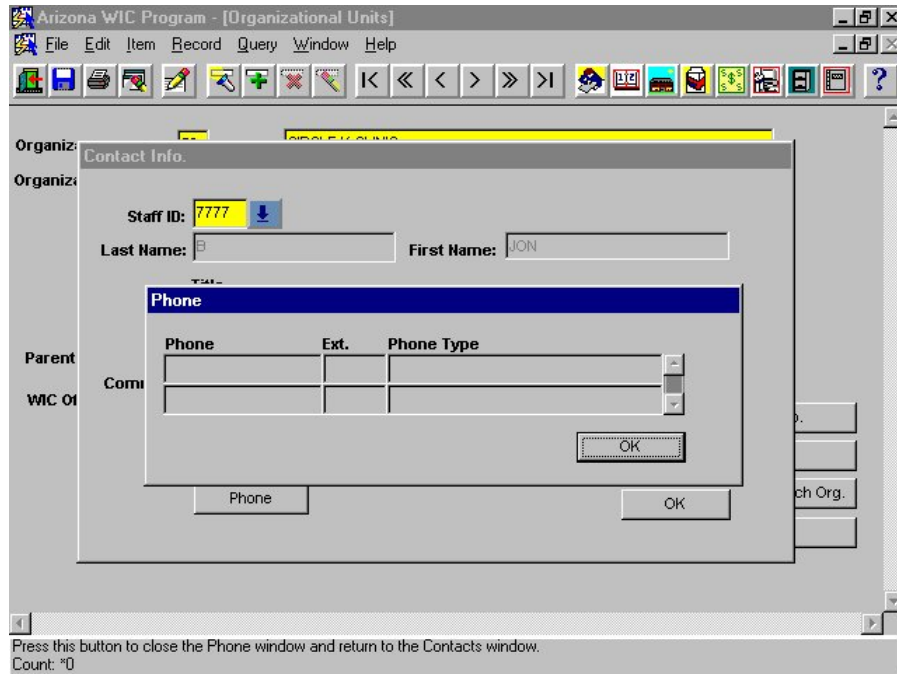
Figure 9 - Organizational Units (Contact Info. Phone Pop-up Window)

17. Click the OK button to save the data and return to the Organizational Units window.
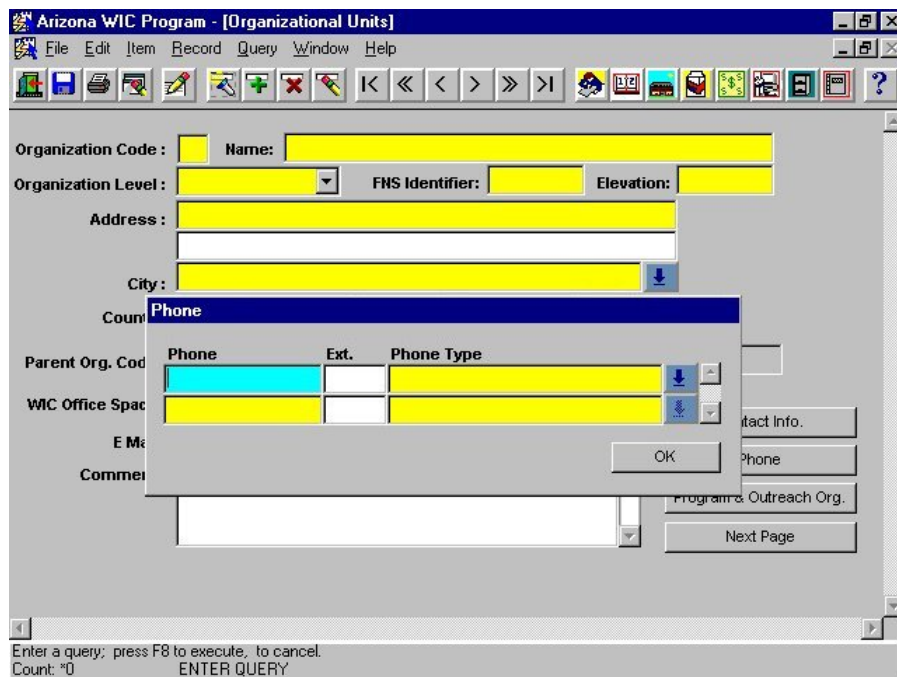18. Click the Phone push button to display the Phone pop-up window.

Figure 10 - Organizational Units (Phone Pop-up window)

19. Enter the phone data for this organizational unit.
20. Click the OK button to save the data and return to the Organizational Units window.
21. Click the Program & Outreach Org. push button to display the Program & Outreach/Referral Organizations pop-up window.

Figure 11 - Organizational Units (Program & Outreach/Referral Organizations Pop-up window)

22. Click the Code LOV in the Program Categories section and select the program category identification code for which this organizational unit provides services. The System displays the Description field for this program once the Code field is selected.
23. TAB to the Comment field and enter any associated comments for this program, if needed.
24. Repeat Code selection and entering comments for all programs associated with this organizational unit.
25. Click the Code field in the Outreach/Referral Organizations section. Some of these fields may already be populated with Outreach/Referral Organizations affiliated with Programs entered in the Program Categories section.
26. To add an Outreach/Referral Organization not already associated with the selected Programs, click the Insert Record icon on the toolbar.
27. Click the Code LOV and select the Outreach/Referral Organization identification code. The System displays the name of the Outreach/Referral Organization in that field once the Code is selected.
28. Click the OK push button to save the data, close the pop-up window and return to the Organizational Units window.
29. Click the Next Page push button to display the Organizational Units Characteristics pop-up window.

Figure 12 - Organizational Units (Organizational Units Characteristics Pop-up Window)

30. The Print Appointment Notices checkbox defaults to checked. Uncheck the box to cancel the automatic generation of Appointment Notices.
31. The Print Appointment Labels checkbox defaults to checked. Uncheck the box to cancel the automatic generation of address labels for appointments.
32. TAB to the Cross Streets field and enter the main crossroads nearest to this organizational unit, if desired.
33. TAB to the Organization Size and select the size of the organizational unit (small, medium, large) from the drop-down list.
34. TAB to the WIC Clinic checkbox and mark as checked if this organizational unit is designated as being a WIC clinic.
35. TAB to the CSFP Clinic checkbox and mark as checked if this organizational unit is designated as being a CSFP clinic.
36. TAB to the CSFP Distribution Site checkbox and mark as checked if this organizational unit is designated as a CSFP Distribution Site.
37. TAB to the Zip Codes Serviced field and select the zip code(s) for which this organizational unit provides services.
38. TAB to the Comment field and enter any associated comments for these Operating Characteristics, if needed.
39. Click the OK push button to close the pop-up and return to the Organizational Units window.
40. Click the Save icon to save the data.
41. The system indicates: "Transaction completed." Click the OK button.

Update an Organizational Unit

1. Click the Enter Query icon.
2. Enter the Organization Code and/or the Name of the organizational unit to be updated.

3. Press the F8 key to execute the query. The System displays the known data for the organizational unit selected.
4. To perform an update, click once in the field you wish to update and enter any new information The Organizational Code, Organizational Level or the Food Pattern Prefix may not be updated.
5. Click the Save icon. The System indicates: "Transaction completed." Click the OK button.

Delete an Organizational Unit

1. Click the Enter Query icon.
2. Enter the Organization Code and/or Name.
3. Press the F8 key to execute the query. The System displays the available data for the organization unit to be deleted.
4. Verify that the information to be deleted is showing on the window.
5. Click the Phone push button.
6. Click once on a phone number and click the Remove Record icon. Repeat this procedure for each phone number listed. When all of the phone numbers have been removed, click the OK button.
7. Click the Save icon to save the deleted phone data.
8. Click the Program & Outreach Org. push button.
9. Click the Code field under the Program Categories section and click the Remove Record icon. Repeat this process for each item under the Program Categories section until all have been removed. When they have all been removed, click the OK button.
10. Click the Save icon.
11. Click the Code field under the Outreach/Referral Organizations section and click the Remove Record icon. Repeat this process for each item under the Outreach/Referral Organizations section until you have removed them all. When they are removed, click the OK button.
12. Click the Save icon.
13. To delete the organizational unit, click in the Parent Org. Code field, then click the Remove Record icon. AIM will display the preceding numerical Org. Code within the parent organization.
14. Click the Save icon.

Note: Once an Organizational Unit has been used in the AIM System, it may not be deleted. These instructions are only for when Organizational Units are first established.

Figure 7 – Organizational Units

Fields

Organization Code - The organization's identification number. This field is mandatory and is user-entered.
Name - The organization's name. This field is mandatory and is user-entered.
Organization Level - Clicking on this drop down list allows the user to assign the organization level using the list that contains the values: STATE AGENCY, LOCAL AGENCY and CLINIC. This is mandatory and defaults to LOCAL AGENCY.
FNS Identifier - The Food and Nutrition Services assigned identification number. This field is optional.
Elevation - The elevation, in feet above sea level, for this organizational unit. This field is optional. It is not required by the System, but is needed for all clinics in order to facilitate CDC reporting requirements.

Address - The address of the organization. The first field is mandatory and the second is optional.

City - The city of the organization. This field can be manually entered or the user can select a value from the list of values. Selection of a city fills in the state, county, and zip code. For more information, refer to the Locales window in System Administration. This field is mandatory.

County - The county in which the organization is located. This field is display only and is populated when a city or zip code is selected.

State - The state of the organization. This field is display only and is populated when a city or zip code is selected.

Zip Code - The zip code of the organization. This field can be manually entered or the user can select a value from the list of values. Selection of a zip code fills in the city, county, and state. The additional four-digit zip code is user entered. The first field is mandatory and the second is optional.

Parent Org. Code - Clicking on the list of values button allows the user to select the parent organization. This field is disabled if the organization level is State Agency. If the organization level is Local Agency, the list of values contains the State Agency. If the organization level is Clinic, the list of values contains all of the local agencies. This field is mandatory.

Name - The parent organization's name displayed when the organizational code is selected.

WIC Office Space - The square feet of the office space allocated for the WIC Program at the specific organization. This field is optional.

Measuring Unit - This field indicates how standard measurements are taken (English/Metric). This optional field determines which measurement is defaulted for the weight and height fields on the Medical window of the Enrollment and Certification module.

Food Pattern Prefix - Used to prefix any Custom Food Package ID. This is a unique code within each Clinic in a Local Agency. This field is system-generated.

E-Mail - The organization's E-mail address. This field is optional.

Comment - The user may provide any comments or remarks. This field is optional.

Push Button(s)

Contact Info - Clicking this button displays the Contact Info pop-up window, which allows the user to enter contact information for an organizational unit.

Phone - Clicking this button displays the Phone pop-up window, which allows the user to enter phone information.

Program & Outreach Org. - Clicking this button displays the Program & Outreach/Referral Organizations pop-up window, which allows the user to assign the program categories and outreach/referral organizations to this organizational unit.

Next page - Clicking this button displays the Organizational Unit Characteristics pop-up window, which allows the user to enter additional organizational unit characteristic information.

Figure 8 – Organizational Units (Contact Info Pop-Up Window)

Fields

Staff ID - The identification number of the staff person who is designated as the contact for the organization. This field is mandatory and is selected from the list of values.

Last Name - The contact person's last name. This field is display only and is filled from the selection of a staff ID.

First Name - The contact person's first name. This field is display only and is filled when a staff ID is selected.

Title - The contact's staff title is displayed here when the staff ID is selected.

Comment - Comments regarding the contact person. This field is display only and filled when a staff ID is selected.

Push Button(s)

Phone - Clicking this button allows the user to view phone information for the contact person.
OK - Clicking this button closes the Contact push button window and returns the user to the Organizational Units window.

Figure 9 - Organizational Units (Contact Info. Phone Pop-up Window)

Fields

Phone - The contact person's phone number.   This field is display only and is filled from Staff Data when the Staff ID is selected.
Ext. - The contact person's phone extension. This field is display only and is filled from Staff Data when the Staff ID is selected.
Phone Type - The contact person's phone type description. This field is display only and is filled from Staff Data when the Staff ID is selected.

Push Button(s)

OK - Clicking on this button closes the Phone push button and returns the user to the Contact Info. push button window.

Figure 10 - Organizational Units (Phone Pop-up window)

Fields

Phone - The organizational unit's phone number. This field is optional.
Ext. - The extension number if one exists. This field is optional.
Phone Type - The phone type corresponding to the number. The field is mandatory if a phone number is entered.

Push Button(s)

OK - Clicking this button closes the phone window.

Figure 11 - Organizational Units (Program & Outreach/Referral Organizations Pop-up window)

Fields

Code - The program category identification code. This field is mandatory and is selected from the list of values.
Description - The description for the program category. This field is display only.
Comment - The user may provide any comments or remarks. This field is optional.
Code - The outreach/referral organization identification number. This field is populated in two ways. First, the field is populated when a program category is selected from the list of values and second, the user may also enter additional Outreach/Referral Organizations not associated with program categories selected in the top section of the window.

Outreach/ Referral Organization - The outreach organization name associated with the code. This field is display only and is filled when a program is selected from the list of values.

Push Button(s)

OK - Clicking on this button closes the Program & Outreach/Referral Organization window and returns the user to the Organizational Units window.

Figure 12 - Organizational Units (Organizational Units Characteristics Pop-up Window)

Fields

Cross Streets - The user-entered information indicating the main cross streets nearest this organizational unit. This field is optional.
Organization Size - Clicking on the list of values button allows the user to select the size of the organizational unit (large, medium, small). This field is optional.
Zip Codes Serviced - Clicking on the list of values allows the user to select a zip code(s) for which this organizational unit provides services. This is the field on which the System searches in the Zip Code Lookup window on the Appointment Scheduler module.
Comment - The user may provide any comments or remarks. This field is optional.

Check Box(es)

Print Appointment Notices - If the user selects (checks) this box, the System generates appointment notices during the end-of-day process. This field defaults to checked.
Print Appointment Labels - If the user selects (checks) this box, the System generates appointment address labels during the end-of-day process. This field defaults to checked.
WIC Clinic - If the user selects (checks) this box, the organizational unit is designated as being a WIC clinic. This is used in other areas of the System to allow a list of values window to only display WIC clinics for user selection.
CSFP Clinic - If the user selects (checks) this box, the organizational unit is designated as being a CSFP clinic. This is used in other areas of the System to allow a list of values window to only display CSFP clinics for user selection.
CSFP Distribution Site - If the user selects (checks) this box, the organizational unit is designated as being a CSFP Distribution Site. This is used in other areas of the System to allow a list of values window to display only CSFP Distribution Sites for user selection.

Push Button(s)

OK - Clicking this button closes the funding sources window and returns the user to Organizational Units.

Maintain Outreach Organizations

To Maintain Outreach Organizations:

1. Click Operations Mgt. from the menu bar.
2. Click Outreach Organizations as shown below:

The Outreach/ Referral Organizations window is displayed:

Figure 13 - Maintain Outreach Organizations

Add an Outreach Organization

1. TAB off the Outreach/Referral Org. ID field and the AIM System automatically creates the ID number.
2. Type in the Name of the Outreach/Referral Organization.
3. TAB to the Outreach/Referral Org. Type field and select the type from the list of values.
4. Check the Smoking Referral Org. Checkbox if this organization is a smoking referral organization.
5. TAB to the Address field and type in the address for this Outreach/Referral Organization.
6. TAB to the City field and type in the city, or select it from the list of values. The System defaults the County, State, and Zip Code fields based on the City.

7. TAB to the Contact Information section and type in the Last Name, First Name and MI of the contact for this Outreach/Referral Organization.
8. TAB to the Title field and select the contact person's title from the list of values.
9. TAB to the Comment field and enter any applicable comments, if desired.
10. Click the Communications push button to display the Communications pop-up window.
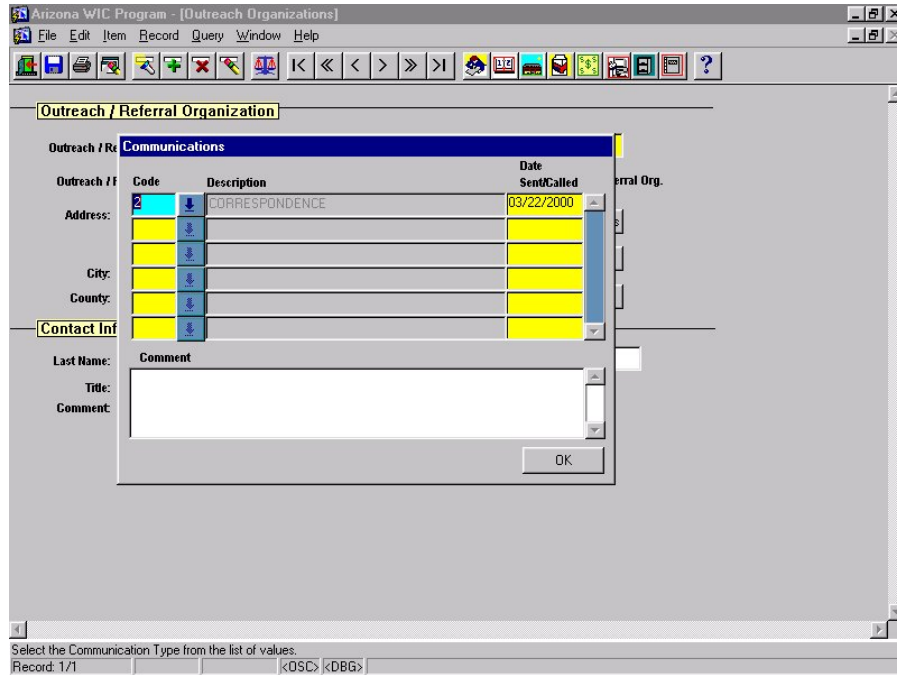
Figure 14 - Maintain Outreach Organizations (Communications Pop-up window)

10. Click the Code list of values button and select a communication code and description. Click OK to close the list of values window and to populate the Code and Communication fields.
11. The Communication Date defaults to the system date, but it may be overwritten, if needed.
12. TAB to the Comments field and enter any applicable comments about this specific communication. *(Note: Only one of a given communication type is allowed each day. If multiple communications of the same type are done on the same day, you must record them in the comment field).*
13. Click on the OK button to return to the Outreach Organization window.
14. Click the Programs push button to display the Programs pop-up window.

Figure 15 - Maintain Outreach Organizations (Programs Pop-up window)

15. Click on the list of values button next to the ID field and select the code for the program category for which the Outreach/Referral Organization provides services.
16. TAB to the Comment field and enter any applicable comments, if needed.
17. Click the OK button to return to the Outreach/Referral Organizations window.
18. Click the Phone push button to display the Phone pop-up window.

Figure 16 - Maintain Outreach Organizations (Phone Pop-up window)

19. Enter Phone information for this Outreach/Referral Organization.
20. Click the OK button to return to the Outreach/Referral Organizations window.
21. Click the Save icon.
22. The system indicates: "Transaction completed."
23. Click the OK button.

Update an Outreach Organization

1. Click the Enter Query icon.
2. Enter the Outreach/Referral Org. ID, the Name, and/or the Outreach/Referral Org. Type for the Outreach Organization you wish to update in the corresponding field.
3. Press the F8 key to execute the query. The system displays the organization's information.
4. Verify that the information on the window matches that for the Outreach Organization you wish to update.
5. Update record as needed. You may not update the Outreach/Referral Org. ID.
6. Click the Save icon.
7. The system indicates: "Transaction completed."
8. Click the OK button.

Delete an Outreach Organization

1. Click the Enter Query icon.
2. Enter the Outreach/Referral Org. ID, the Name, and/or the Outreach/Referral Org. Type for the organization you wish to delete in the corresponding field.
3. Press the F8 key to execute the query. The system displays the organization's information.
4. Verify that the information on the window matches that the Outreach Organization you wish to delete.
5. Click the Communications push button. When the Communications pop-up window is displayed delete the communications records by clicking the Remove Record icon, then click the OK button.
6. Click the Programs push button. When the Programs pop-up window is displayed, delete the program records by clicking on the Remove Record icon, and then click the OK button.
7. Click the Phone button. When the Phone pop-up window is displayed, delete the phone records by clicking the Remove Record icon, and then click the OK button.
8. Click the Save icon.
9. The system displays the message "Transaction completed." Click OK.
10. Click the Outreach/Referral Org. ID field, and then click the Remove Record icon.
11. The System clears the Outreach/Referral Organization information from the window.
12. Click the Save icon. The system displays the message "Transaction completed."
13. Click the OK button.

Figure 13 - Maintain Outreach Organizations

Fields

Outreach/Referral Org. ID - The outreach/referral organization's identification number. This field is mandatory and is system generated.
Name - The outreach/referral organization's name. This field is mandatory and is user-entered.
Outreach/Referral Org. Type - Clicking on the list of values button allows the user to assign the outreach/referral org. type. For more information, refer to the Maintain Outreach/Referral Organization Types window. This field is mandatory.

Address - The outreach/referral organization's address. The first line is mandatory and the second is optional.
City - The outreach/referral organization's city. This field can be entered manually or the user can select a value from the list of values. Selection of a city fills in the state, county, and zip code. This field is mandatory.
County - The county where the outreach/referral organization is located. This field is display only and is populated when a city or zip code is selected.
State - The outreach organization's state. This field is display only and will be populated when a city or zip code is selected.
Zip Code - The outreach/referral organization's zip code. This field can be entered manually or the user can select a value from the list of values. Selection of a zip code fills in the city, county, and state. The additional four-digit code is user-entered. The first field is mandatory and the second is optional.
Last Name - The outreach/referral organization contact's last name. This field is mandatory.
First Name - The outreach/referral organization contact's first name. This field is optional.
MI1 - The outreach/referral organization contact's middle initial. This field is optional.
MI2 - The outreach/referral organization contract's second middle initial. This field is optional.
Title - The contact's title at the outreach/referral organization. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Push Button(s)

Communications - Clicking this button displays the Communications Pop-up window.
Programs - Clicking this button displays the Programs Pop-up window.
Phone - Clicking this button displays the Phone Pop-up window.

Check Box(es)

Smoking Referral Organization – Checking this box indicates the organization is a smoking referral organization.

Figure 14 - Maintain Outreach Organizations (Communications Pop-up window)

Fields

Code - The ID number of the communication type. This field is mandatory and selected from the list of values.
Description - The description of the communication is populated when the Code is selected. This field is display only.
Date Sent/Called - The date when the communication occurred. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Push Button(s)

OK - Clicking this button returns the user to the Outreach/Referral Organizations window.

Figure 15 - Maintain Outreach Organizations (Programs Pop-up window)

Fields

ID - Identifier for the program category. This field is mandatory and selected from the list of values.

Description – The description of the program category is populated when the ID is selected. This field is display only.

Comment - The user may provide any comments or remarks. This field is optional.

Push Button(s)

OK - Clicking this button returns the user to the Outreach/Referral Organizations window.

Figure 16 - Maintain Outreach Organizations (Phone Pop-up window)

Phone - The outreach/referral organization's phone number. This field is optional.

Ext. - The extension number, if applicable. This field is optional.

Phone Type - The type of telecommunications device this number represents. This field is mandatory if phone number is entered.

Push Button(s)

OK - Clicking this button returns the user to the Outreach/Referral Organizations window.
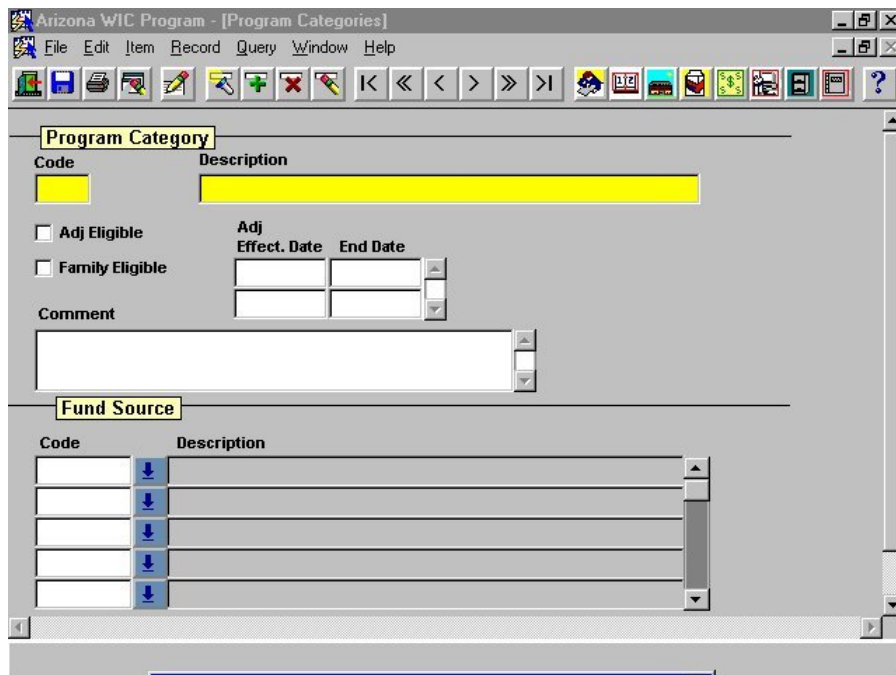
Maintaining Programs

To Maintain Programs:

1. Click Operations Mgt. on the Operations Management main menu.
2. Click Programs as shown below:

The Programs window is displayed:

Figure 17 - Programs

Add a Program

1. Click the Insert Record icon and all the fields are become blank.
2. Enter the Code and Description fields under the Program section. If the Program Code already exists, the system will inform you.
3. TAB to the Adj. Eligible checkbox and mark as checked if participation in this program makes the participant adjunctively eligible for the WIC Program.
4. TAB to the Family Eligible checkbox if participating and mark as checked if participation in this program makes the participant's family members adjunctively eligible for WIC benefits.
5. TAB to the Print on Care Plan checkbox and mark as checked to default the Print checkboxes as checked for the Program on the Care Plan in the Enrollment & Certification module.

6. TAB to the Adj. Effective Date field and enter the start date of the period in which a participant is adjunctively eligible for the WIC Program if they participate in this particular Program Category.
7. TAB to the End Date field and enter the end date of the period in which a participant is eligible for the WIC Program is they participate in this particular Program Category.
8. TAB to the Comment field and enter any applicable comments, if needed.
9. Click the Code list of values button in the Fund Source section to select the fund source(s) for this Program Category. The AIM System displays the Description of the Fund Source in that field once the Code is selected.
10. Click the Save icon on the toolbar to save the data.

Update a Program

1. Click the Enter Query icon.
2. Enter the Code and/or or Description for the Program Category you wish to update.
3. Press the F8 key to execute the query. The System displays the Program Category's information.
4. Verify that the information on the window matches that for the Program Category you wish to update.
5. Update the record as needed.
6. Click the Save icon. The System indicates: "Transaction completed."
7. Click the OK button.

Delete a Program

1. Click the Enter Query icon.
2. Enter the Code and/or Description for the program category you want to delete.
3. Press the F8 key to execute the query. The System displays the Program Category information.
4. Verify that the information on the window matches the Program Category you wish to delete.
5. Click the Code field under the Fund Source section of the window, and then click the Remove Record icon. Repeat this for each Fund Source record.
6. Click the Save icon. The system displays the message "Transaction completed."
7. Click the OK button.
8. Click the Code field under the Program section of the window, click the Remove Record icon and the System automatically deletes the program category information from the window.
9. Click the Save icon. The System displays the message "Transaction completed."
10. Click the OK button.

Figure 17 - Programs

Fields

Code - An alpha identifier for a Program Category. This field is user-entered and is mandatory.
Description - This field is mandatory and is the user-entered program category description.
Adj Effect. Date - The start date of the period in which a participant is adjunctively eligible for the WIC Program if they participate in the designated program category. This field is mandatory.
End Date - The end date of the period in which a participant is adjunctively eligible for the WIC Program if they participate in the designated program category. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.
Code - The user selects the code for fund sources used to fund program categories. This field is optional.

Description - This field displays the name of the funding source from the Code selected by the user in the previous field.

Check Box(es)

Adj. Eligible - This box is checked if enrollment in the program makes the participant adjunctively eligible for the WIC Program.
Family Eligible - This box is checked if the enrollment of a family member in the program makes all participants in the family adjunctively eligible for the WIC Program.

Time Study Daily Log

To Update Time Study Daily Log:

1. Click Operations Mgt. on the Operations Management main menu.
2. Click Time Study Daily Log as shown below:

The Time Study-Daily Log window is displayed:

Figure 18 - Time Study-Daily Log

Update Time Study Daily Log

1. The Agency field displays the Organizational Code of the agency to which you are logged on.
2. TAB to the Staff ID field and select a staff member's ID number from the list of values.
3. Only those users with Time Study Supervisor authorization can select other staff member's ID numbers. If a user has no such authorization, their Staff ID number is displayed in this field upon entering the window.
4. TAB to the Date field and type in the date for which activity information is being entered.
5. In the Minutes Spent on Activities section, enter the number of minutes during the corresponding Time Slot that was spent performing the various activities.
6. The AIM System calculates the Daily Totals and the Hours field values.
7. Click the OK button to save the data and exit the window.

Figure 18 - Time Study-Daily Log

Fields

Agency – The System displays the Organization Code of the Agency the user logged into on the Log on window. This field is display only.
Staff ID – Clicking this list of values button allows the user who has the Time Study Supervisor capability checked off in the Systems Administration Security window to select the ID number of another staff member in the Agency in which the user is logged-on. Users without the Time Study Supervisor capability have their Staff ID number displayed in this field. This field is mandatory for users with the Time Study Supervisor capability and display only for those users without this security capability.
Date – The user enters the date for which the activity information is being entered. This field is mandatory.

Participant Services – The user enters the number of minutes during the corresponding hour that was spent performing face-to-face services to participants, other than Nutrition Ed, Breastfeeding, CSFP, etc. This field is optional.

Nutrition Education – The user enters the number of minutes during the corresponding hour that was spent performing group or individual nutrition education services. This field is optional.

Breastfeeding – The user enters the number of minutes during the corresponding hour that was spent performing breastfeeding-related services to participants. This field is optional.

Admin – The user enters the number of minutes during the corresponding hour that was spent performing administrative procedures. This field is optional.

Immunization – The user enters the number of minutes during the corresponding hour that was spent performing services related to immunization. This field is optional.

CSFP – The user enters the number of minutes during the corresponding hour that was spent performing services related to CSFP. This field is optional.

Tobacco – The user enters the number of minutes during the corresponding hour that was spent performing services related to tobacco intervention. This field is optional.

Other – The user enters the number of minutes during the corresponding hour that was spent performing activities related to other State or Local Agency funding sources. This field is optional.

Daily Totals (min) – The number of minutes spent performing the activity shown at the top of the column by the staff member for the date entered above. This field is calculated by the System.

Hours – The total number of hours spent performing the activity shown at the top of the column by the staff member for the date entered above. This field is calculated by the System.

Push Button(s)

Create Log -

Annual WIC Cost Summary

To Update Annual WIC Cost Summary:

1. Click Operations Mgt. on the Operations Management main menu.
2. Click Annual WIC Cost Summary as shown below:

The Annual WIC Cost Summary window is displayed:

Figure 19 – Annual WIC Cost Summary

To produce an Annual WIC Cost Summary Report

1. Click on the Local Agency LOV. The drop down displays the agency you are logged-on. Click on the agency name.
2. TAB to the Fiscal Year field and enter the fiscal year for which the budget information is being entered.
3. Click the Create Log push button to enable the fields below.
4. The AIM System calculates the Personnel and ERE values for each activity category by using the information from the Time Study-Daily Log window.
5. Enter the values for the other budget items corresponding to the activity categories.

6. The AIM System calculates and displays the Total fields.
7. Click the OK button to exit the window and return to the Operations Management main menu.

Figure 19 – Annual WIC Cost Summary

Fields

Local Agency - The System displays the Organization Code of the Agency the user logged into on the Log on window. This field is display only.

Fiscal Year (FFY) - The four digits of the Fiscal Year for which the budget information is being entered. This field is mandatory.

Personnel & ERE - The System utilizes the information being entered in the Time Study-Daily Log by the Local Agency staff to determine the values populated in this field for each category. The System records/displays the total Personnel & ERE costs for all staff members at the local agency selected for the fiscal year ended. This field is optional.

Professional & Outside Services - The user enters the number of dollars expended for Professional & Outside Services in each of the activity categories shown at the top of each column. This field is optional.

Travel Costs - The user enters the number of dollars expended for travel in each of the activity categories shown at the top of each column. This field is optional.

Occupancy Costs - The user enters the number of dollars expended for occupancy costs in each of the activity categories shown at the top of each column. This field is optional.

Other Operating Costs - The user enters the number of dollars expended for other operating costs in each of the activity categories shown at the top of each column. This field is optional.

Capital Costs - The user enters the number of dollars expended for capital costs in each of the activity categories shown at the top of each column. This field is optional.

Indirect Costs - The user enters the number of dollars expended for indirect costs in each of the activity categories shown at the top of each column. This field is optional.

Total (Time Slot) - The System totals the number of dollars spent on each of the activity categories in that local agency for the fiscal year shown.

Total (of Rows) - The System displays the total dollar amount for values dollar values entered in each row. This field is display only.

Push Button(s)

Create Log – The user must click this button to enable the fields.

Maintain Outreach/Referral Communication Types

To Maintain Outreach/Referral Communications Types:

1. Click Tables on the Operations Management main menu.
2. Click Outreach/Referral Communications Types as shown below:

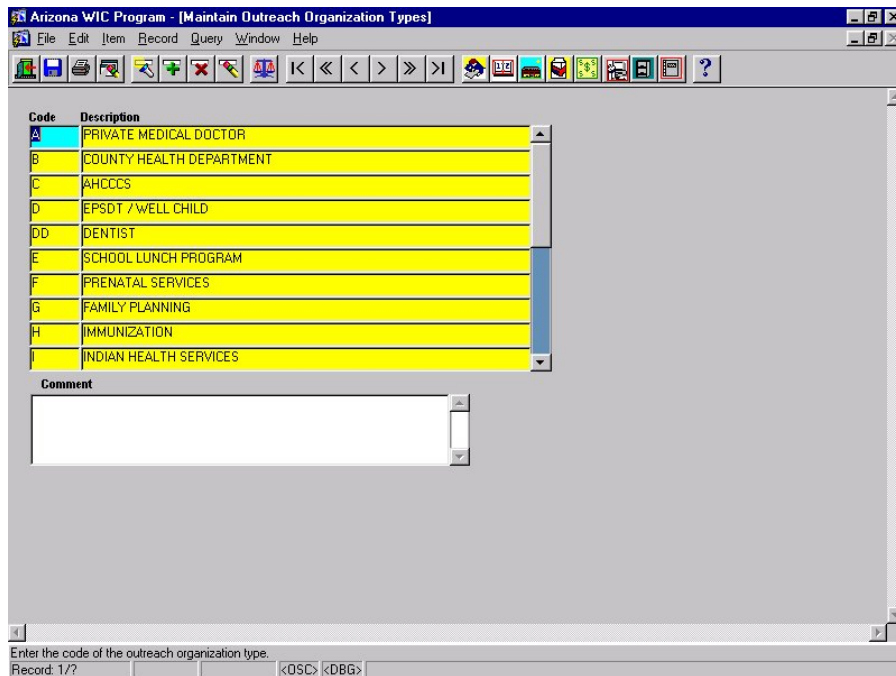The Maintain Outreach/Referral Communication Types window is displayed:
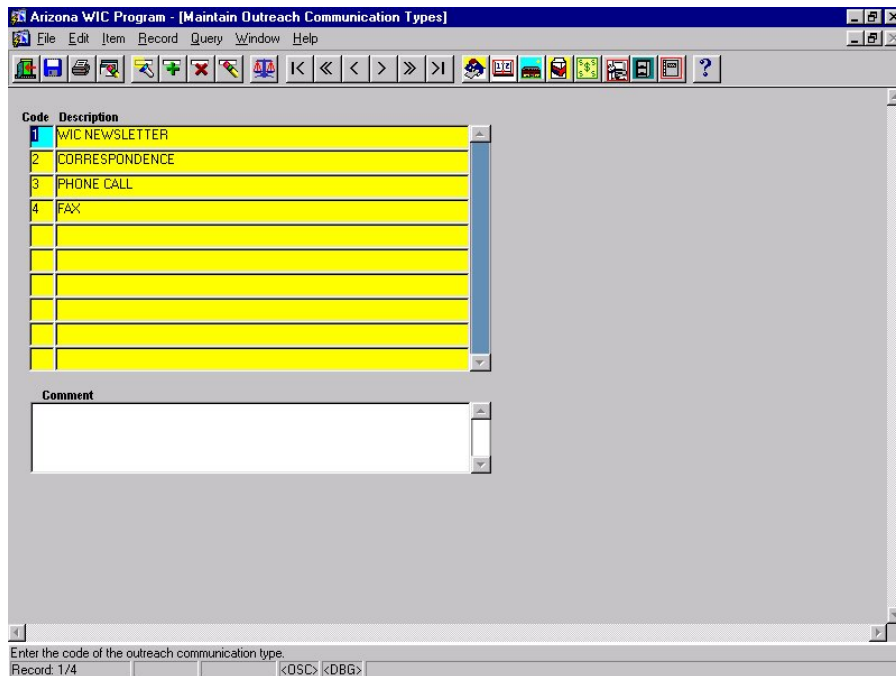
Figure 20 - Maintain Outreach/Referral Communication Types

Add an Outreach/Referral Communication Type

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Outreach/Referral Communication Type.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Outreach/Referral Communication Type.
3. In the Code field, enter a number for the new Outreach/Referral Communication Type to be added. If the code you choose is already in use for another Outreach/Referral Communication Type, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Caseload Type.

5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update an Outreach Communication Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Outreach/Referral Communication Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Outreach/Referral Communication Type.
7. Update the Outreach/Referral Communication Type as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update"*).
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete an Outreach Communication Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Outreach/Referral Communication Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Outreach/Referral Communication Type.
7. Verify that the information being displayed is for the Outreach/Referral Communication Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Outreach/Referral Communication Type.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 20 - Maintain Outreach/Referral Communication Types

Fields

Code - A numeric identifier for an outreach/referral communication type. This field is mandatory.
Description - This field is mandatory and is the user-entered description of the outreach/referral communication type.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Outreach/Referral Organization Types

To Maintain Outreach/Referral Organization Types:

1. Click Tables on the Operations Management main menu.
2. Click Outreach Organization Types as shown below:

The Maintain Outreach/Referral Organization Types window is displayed:

Figure 21 - Maintain Outreach/Referral Organization Types

Add an Outreach/Referral Organization Type

1. The System defaults the cursor to highlight the code letters under the first entry in the Code field. The System also displays the Description and any existing Comments for that Outreach/Referral Organization Type.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Outreach/Referral Organization Type.
3. In the Code field, enter an alpha code for the new Outreach/Referral Organization Type to be added. If the code you choose is already in use for another Outreach/Referral Organization Type, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code letters inserted, and enter a different code.

4. TAB to the Description field and enter the description of the new Outreach/Referral Organization Type.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update an Outreach Organization Type

1. Press the F7 key or click the Enter Query icon.
2. The system automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Outreach/Referral Organization Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Outreach/Referral Organization Type.
7. Update the Outreach/Referral Communication Type as needed. (*Note: The system does not allow updates to the Code itself. If attempted, the system indicates: "Field is protected against update."*)
8. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete an Outreach Organization Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Outreach/Referral Organization Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Outreach/Referral Organization Type.
7. Verify that the information being displayed is for the Outreach/Referral Organization Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click on the Save icon. The displays a pop-up window indicating: "Transaction completed."
10. Click the OK button.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 21 - Maintain Outreach/Referral Organization Types

Fields

Code - An alpha identifier for an outreach/referral organizational type. This field is mandatory.
Description - This field is mandatory and is the user-entered description of the outreach/referral organization type.
Comment - The user may provide any comments regarding this outreach/referral organization type. This field is optional.

Maintaining Staff Titles

To Maintain Staff Titles:

1. Click on Tables on the Operations Management main menu.
2. Click on Staff Titles as shown below:


The Maintain Staff Titles window is displayed:
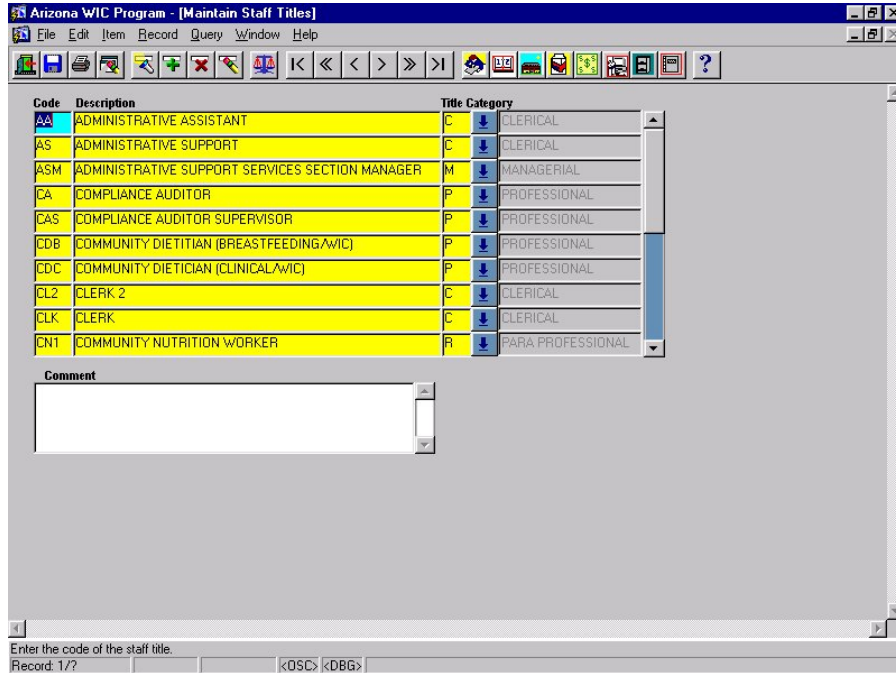
Figure 22 - Maintain Staff Titles

Add a Staff Title

1. The system defaults the cursor to highlight the code under the first entry in the Code field. The System also displays the Description and any existing Comments for that Staff Title.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Staff Title.
3. In the Code field, enter an alphanumeric code for the new Staff Title. If the code you choose is already in use for another Staff Title, the system displays a pop-up window indicating: "Row already exists with same Staff Title Code." Click the OK button, delete the Code previously inserted, and enter a new code.
4. TAB to the Description field and enter the description of the new Staff Title.

5. Click the list of values button next to the Title Category field. Then select the category for the staff title.
6. TAB to the Comment field and enter any applicable comments.
7. Click the Save icon.
8. The system displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Update a Staff Title

1. Press the F7 key or click the Query icon.
2. The system automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Staff Title being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The system displays any known data corresponding to this Staff Title.
7. Update the Staff Title as needed. (*Note: The system does not allow updates to the Code itself. If attempted, the system indicates: "Field is protected against update."*)
8. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Staff Title

1. Press the F7 key or click Query icon.
2. The system automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Staff Title to be deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Staff Title.
7. Verify that the information being displayed is for the Staff Title to be deleted.
8. Click the Remove Record icon. The system deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Staff Title.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 22 - Maintain Staff Titles

Fields

Code - An alphanumeric identifier for a staff title. This field is mandatory.
Description - This field is mandatory and is the user-entered description of the staff title.
Title - Clicking on this list of values button allows the user to select the category for the title. For more information, refer to the Maintain Title Categories window. This field is mandatory.
Category -This description defaults from its associated code. This field is display only.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Title Categories

To Maintain Title Categories:

1. Click Tables on the Operations Management menu.
2. Click Title Categories as shown below:

The Maintain Title Categories window is displayed:
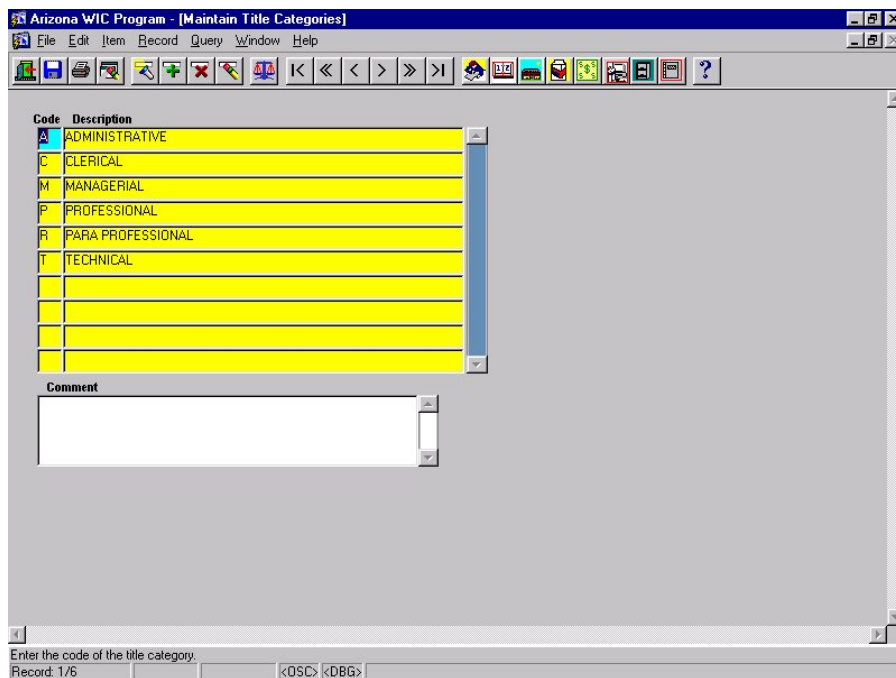
Figure 23 - Title Categories

Add a Title Category

1. The System defaults the cursor to highlight the code under the first entry in the Code field. The System also displays the Description and any existing Comments for that Title Category.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Title Category.
3. In the Code field, enter an abbreviation of letters for the new Title Category. If the code you choose is already in use for another Title Category, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code letters previously inserted, and enter different letters.
4. TAB to the Description field and enter the description of the new Title Category.
5. TAB to the Comment field and enter any applicable comments.

6. Click the Save icon.
7. The System displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Title Category

1. Pres the F7 key or click the Query icon.
2. The system automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Title Category being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Title Category.
7. Update the Title Category as needed. (*Note: The system does not allow updates to the Code itself. If attempted, the system indicates: "Field is protected against update."*)
8. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Title Category

1. Press the F7 key or click the Query icon.
2. The system automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter the Code or the Description of the Title Category being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The system displays any known data corresponding to this Title Category.
7. Verify that the information being displayed is for the Title Category to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete a Title Category.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 23 - Title Categories

Fields

Code - The alpha identifier for a title category. This field is mandatory.
Description - This field is mandatory and is the user-entered description of the title category.
Comment - The user may provide any comments or remarks. This field is optional.

Creating Agency Mailing Labels

To Create Agency Mailing Labels:

1. Click Outputs on the Operations Management main menu.
2. Click Labels. The sub-menu is displayed.
3. Click Agency Labels as shown below:
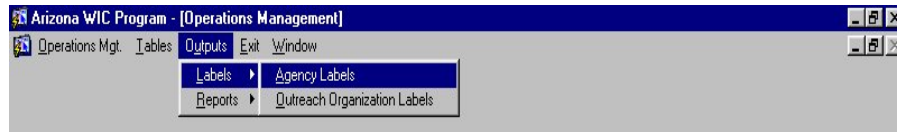
The Agency Mailing Labels parameter window is displayed:
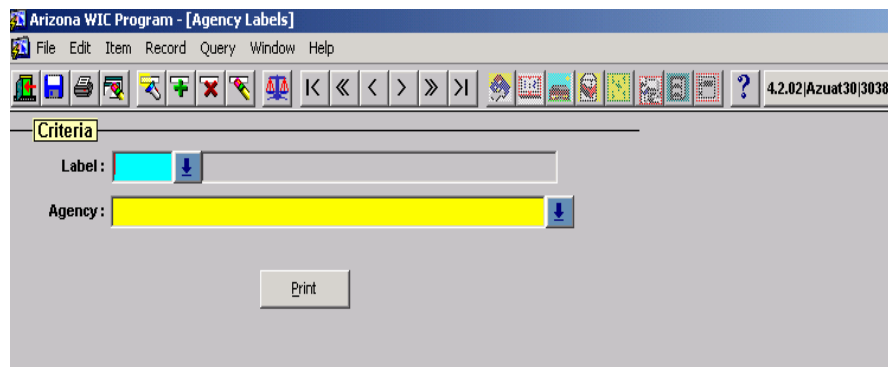
Figure 24 - Agency Mailing Labels

Create Agency Mailing Labels

1. Click on the drop down button to the right of the 'Label' field to select the appropriate mailing label.
2. Click on the drop down button to the right of the 'Agency' field to select the desired agency.
3. After the desired choices have been made click on the 'Print' button to generate the mailing labels.
4. User is given the option of choosing which label position to begin with. Selecting '1' prints from the first label in the sheet to the last.
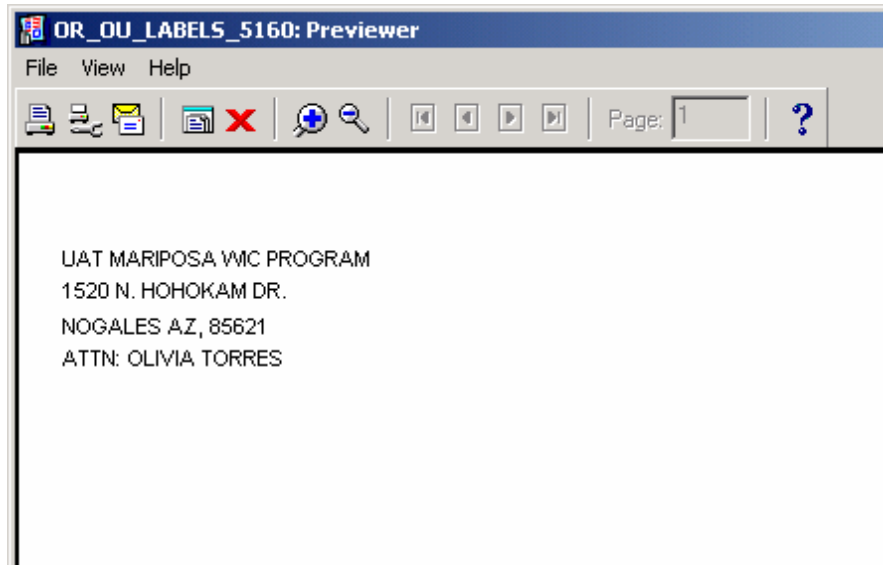
Sample of Agency Mailing Labels

8. Click the Previous, Next, First, Last and Page icons at the top of the window to move forward and backward through the report pages.
9. Click the Print icon to print the report.
10. Click the Close icon to exit the preview window and return to the Operations Management main menu.
11. Click the New icon to view a new copy of the same preview window.

Figure 24 - Agency Mailing Labels

Fields

Label - Offers a choice of Avery printer labels: 5160 – HP 3x10 and 5163 HP 2x5
Agency - The user may select the identification number of the organizational unit for which the mailing labels are generated.

Creating Outreach Organization Mailing Labels

To Create Outreach/Referral Organization Mailing Labels:

1. Click Outputs on the Operations Management main menu.
2. Click Labels. The sub-menu is displayed.
3. Click Outreach Organization Labels as shown below:

The Outreach Organization Labels parameter window is displayed:
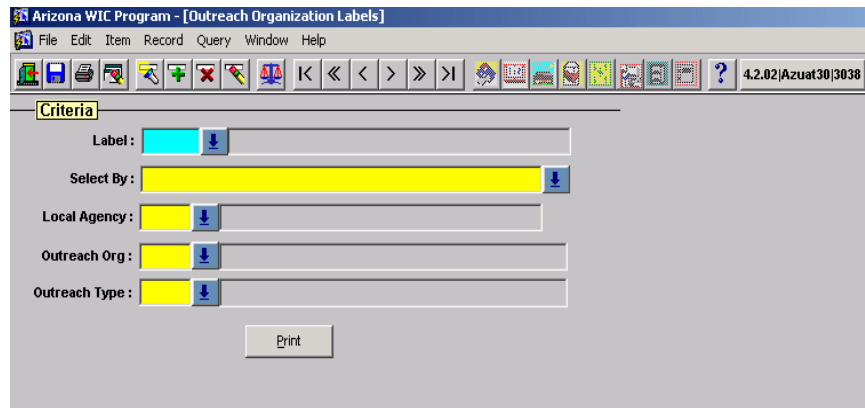
Figure 25 - Outreach Organization Mailing Labels

Produce Outreach Organization Mailing Labels

1. Click on the drop down button to the right of the 'Label' field to select the appropriate
    mailing label.
2. Click on the drop down button to the right of the 'Select By' field to select for which factor
    mailing labels are to be produced.
3. Click on the drop down button to the right of the field corresponding to the choice populated
    in the Select By field, (e.g. if Select By field is Outreach ID, TAB to the Outreach ID field.),
    to select the properties for the report.

Note: Only one factor per report may be selected.

4. After the desired choices have been made click on the 'Print' button to generate the mailing
    labels.
5. User is given the option of choosing which label position to begin with. Selecting '1' prints
    from the first label in the sheet to the last.
The following message will be presented giving instruction to the user to close any open Reports
Background Engines before generated mailing labels: "Be Sure To Close Any Reports
Background Engine(s) (right-click on the taskbar at the bottom of the screen) Before Printing
Labels."
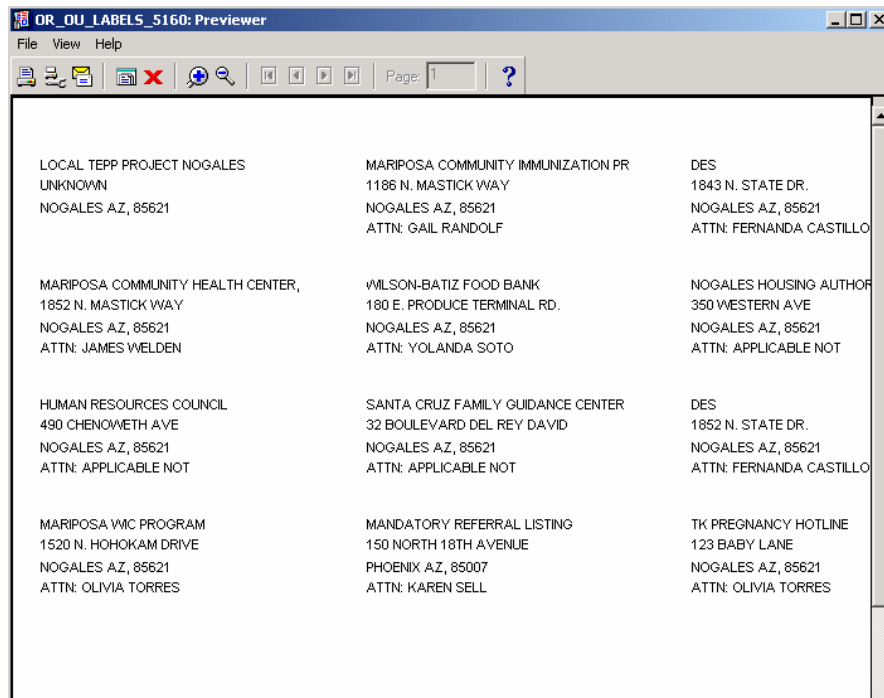
Sample of Outreach Organization Mailing Labels

8. Click the Previous, Next, First, Last and Page icons at the top of the window to move forward and backward through the report pages.
9. Click the Print icon to print the report.
10. Click the Close icon to exit the preview window and return to the Operations Management main menu.
11. Click the New icon to view a new copy of the same preview window.

Figure 25 - Outreach Organization Mailing Labels

Fields

Label - Offers a choice of Avery printer labels: 5160 – HP 3x10 and 5163 HP 2x5
Select By - Click this drop-down list to select mailing labels produced based upon one of three areas: Local Agency, Outreach ORG or Outreach Type.
Local Agency - The user may select the identification number of the organizational unit for which the labels are generated. This field is mandatory if the chosen 'Select By' criterion is Local Agency.
Outreach ORG - The user may select the identification number of the outreach organizational unit for which the mailing labels generated. This field is mandatory if the chosen 'Select By' criterion is Outreach ORG.
Outreach Type - The user may select the type of organizational unit for which mailing labels are generated. This field is mandatory if the chosen 'Select By' criterion is Outreach Type.

Producing a FNS 648 Local Agency Directory Report

To Produce a FNS 648 Local Agency Directory Report:

1. Click Outputs on the Operations Management main menu.
2. Click Reports. The sub-menu is displayed.
3. Click FNS 648 Local Agency Directory as shown below:
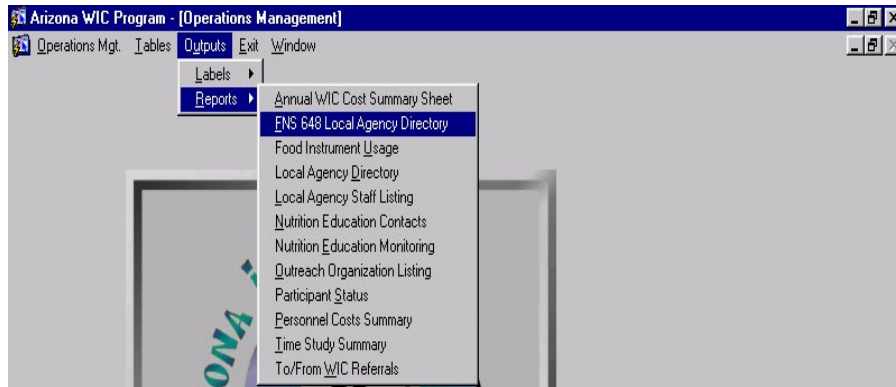
The FNS 648 Local Agency Directory parameter window is displayed:

Figure 26 - FNS 648 Local Agency Directory

Produce a FNS 648 Local Agency Directory Report

1. Click the down arrow in the Output Device field to activate the drop down box. Then select which output device to the report is to be sent by double clicking on that device name.
2. TAB to the Filename field. If saving to file, enter the filename for the report being generated.
3. TAB to the Number of Copies field. Type the number of report copies desired in this field.

4. TAB to the Type of Report field. Select the report type from the drop-down list.
5. TAB to the Effective Date and enter the date using a MM/DD/YYYY format as indicated on the window.
6. TAB to the Organization ID/Level field and select the organization ID/level from the drop-down list.
7. After the information has been entered, click the green light icon.
8. If 'display' is selected as the output device, the System displays the preview window shown below. Otherwise, the report is processed per the output device selected.

Sample of FNS 648 Local Agency Directory Report

9. Click the Previous, Next, First, Last and Page icons at the top of the window to move forward and backward through the report pages.
10. Click the Print icon to print the report.
11. Click the Close icon to exit the preview window and return to the Operations Management main menu.
12. Click the New icon to view a new copy of the same preview window.

Figure 26 - FNS 648 Local Agency Directory

Fields

Output Device - The user may select (from a drop-down list): display (window), file, or printer.
Filename - If file is selected as the output device, the directory and filename are entered.
**Number of Copies** - Select number of copies to print.
Type of Report - Clicking the list of values allows the user to select the type of report to be sent to the FNS: addition, update, or deletion.

Effective Date - The date that the addition, update, or deletion of the Local Agency Directory information is to become effective. This field is user-entered.

Organization ID/Level - Clicking the list of values allows the user to select the organizational unit name and its corresponding level for which to generate the report.

Producing a Directory Report of all Local Agencies

To Produce a Local Agency Directory Report:

1. Click Outputs on the Operations Management main menu.
2. Click Reports. The sub-menu is displayed.
3. Click Local Agency Directory as shown:

The Local Agency Directory parameter window is displayed:

Figure 27 - Local Agency Directory

Produce a Local Agency Directory

1. Click the down arrow in the Output Device field to activate the drop down box. Then select
    the output device by double clicking on that device name.
2. TAB to the Filename field. Enter the filename for the report.
3. TAB to the Number of Copies field. Type in the number of report copies desired in this field.

4. TAB to the Internal/External field and select the type of report from the drop-down list.
5. After information has been entered, click the green light icon.
6. If 'display' is selected as the output device, the System displays the preview window shown below. Otherwise, the report is processed per the output device selected.

Sample of Local Agency Directory Report

7. Click the Previous, Next, First, Last and Page icons at the top of the window to move forward and backward through the report pages.
8. Click the Print icon to print the report.
9. Click the Close icon to exit the preview window and return to the Operations Management main menu.
10. Click the New icon to view a new copy of the same preview window.

Figure 27 - Local Agency Directory

Fields

Output Device - The user may select (from a drop-down list): display (window), file, or printer.
Filename - If file is selected as the output device, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Internal/External - The user selects whether the generated report is one used for Internal (WIC, CSFP) distribution or External distribution.

Producing a Local Agency Staff Listing Report

To Produce a Local Agency Staff Listing Report:

1. Click Outputs on the Operations Management main menu.
2. Click Reports. The sub-menu is displayed.
3. Click Local Agency Staff Listing as shown:
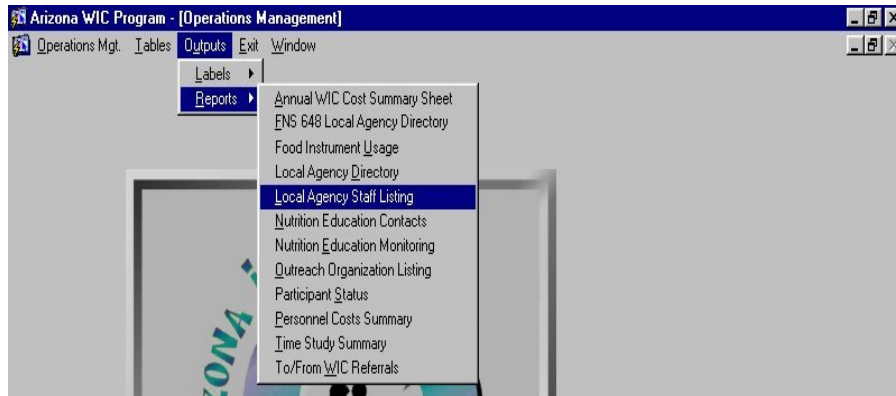
The Local Agency Staff Listing parameter window is displayed:

Figure 28 - Local Agency Staff Listing

Produce a Local Agency Staff Listing Report

1. Click the down arrow in the Output Device field to activate the drop down box. Then select which output device the report is to be sent by double clicking on that device name.
2. TAB to the Filename field. If saving to file, enter the filename for the report being generated.

3. TAB to the Number of Copies field. Type the number of report copies desired in this field.
4. TAB to the Program Category field. Select the program category from the drop-down list.
5. TAB to the Sort Sequence field and select the sort sequence for the report from the drop-down list.
6. After the information has been entered, click the green light icon.
7. If 'display' is selected as the output device, the System displays the preview window shown below. Otherwise, the report is processed per the Output Device selected.

Sample of Local Agency Staff Listing Report

8. Click the Previous, Next, First, Last and Page icons at the top of the window to move forward and backward through the report pages.
9. Click the Print icon to print the report.
10. Click the Close icon to exit the preview window and return to the Operations Management main menu.
11. Click the New icon to view a new copy of the same preview window.

Figure 28 - Local Agency Staff Listing

Fields

Output Device - The user may select (from a drop-down list): display (window), file, or printer.
Filename - If file is selected as the output device, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Program Category - Clicking the drop-down list allows the user to select a specific program category (WIC, CSF, Tobacco, Immunization, etc.) for which to generate a Local Agency staff listing.
Sort Sequence - Allows the user to select the report to be sorted by: staff title, category or name.

Producing a Nutrition Education Contacts Report

To Produce a Nutrition Education Contacts Report:

1. Click Outputs on the Operations Management main menu.
2. Click Reports. The sub-menu is displayed.
3. Click Nutrition Education Contacts as shown:
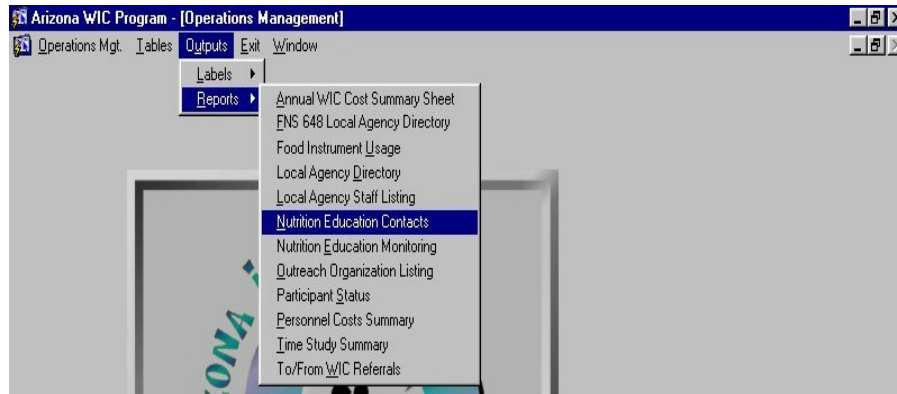
The Nutrition Education Contacts parameter window is displayed:

Figure 29 - Nutrition Education Contacts

Produce a Nutrition Education Contacts Report

1. Click the down arrow in the Output Device field to activate the drop down box. Then select
   to which output device the report is to be sent by double clicking on that device.
2. TAB to the Filename field. If saving to file, enter the filename for the report being generated.
3. TAB to the Number of Copies field. Type the number of report copies desired in this field.

4. TAB to the Reporting Level field and select from the drop-down list.
5. TAB to the From Date field and enter the beginning date on which the report is to be queried, using the format MM/DD/YYYY.
6. TAB to the Thru date field and enter the ending date on which the report is to be queried, using the format MM/DD/YYYY.
7. After information has been entered, click the green light icon.
8. If 'display' is selected as the output device, the System displays the preview window shown below. Otherwise, the report is processed per the output device selected.

Sample of Nutrition Education Contacts Report

9. Click the Previous, Next, First, Last and Page icons at the top of the window to move forward and backward through the report pages.
10. Click the Print icon to print the report.
11. Click the Close icon to exit the preview window and return to the Operations Management main menu.
12. Click the New icon to view a new copy of the same preview window.

Figure 29 - Nutrition Education Contacts

Fields

Output Device - The user may select (from a drop-down list): display (window), file, or printer.
Filename - If file is selected as the output device, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Reporting Level - Gives the user the choice of generating a report by summary or summary and detail. Summary and Detail level can only be selected by a user logging on at the State Agency level.
From Date - The user enters the beginning date on which the report queries records, falling either on or after this date. This field is mandatory.

Thru Date - The user enters the ending date on which the report queries records, falling either on or before this date. This field is mandatory.

Producing a Nutrition Education Monitoring Report

To Produce a Nutrition Education Monitoring Report:

1. Click Outputs on the Operations Management main menu.
2. Click Reports. The sub-menu is displayed.
3. Click Nutrition Education Monitoring as shown below:
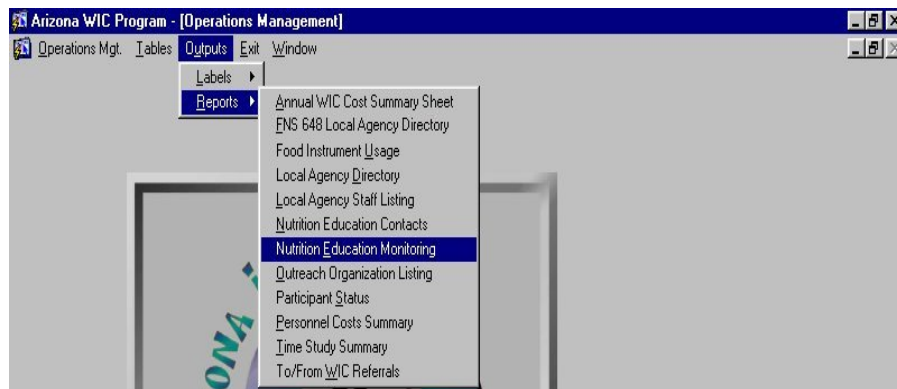
The Nutrition Education Monitoring window is displayed:

Figure 30 - Nutrition Education Monitoring

Create Agency Mailing Labels

1. Click the down arrow in the Output Device field to activate the drop down box. Then select to which output device the report is to be sent to by double clicking on that device name.

2. TAB to the Filename field. If saving to file, enter the filename for the report being generated.
3. TAB to the Number of Copies field. Select the number of report copies desired by typing in that number in this field.
4. TAB to the Local Agency field. Select the Local Agency from the drop-down list.
5. TAB to the Clinic field. Select the clinic from the drop-down list.
6. TAB to the Dates from field and enter the earliest date from which the report is to select records.
7. TAB to the thru field and enter the last date from which the report is to select records.
8. After the information is entered, click the green light icon.
9. If 'display' is selected as the output device, the System displays the preview window shown below. Otherwise, the report is processed per the Output Device selected.
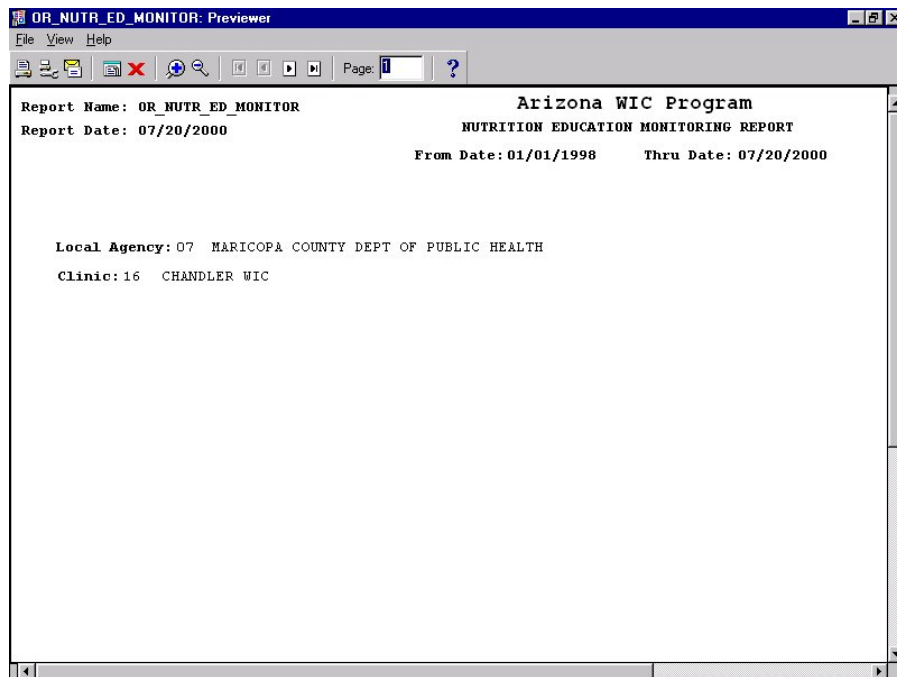
Sample of Nutrition Education Monitoring Report

10. Click the Previous, Next, First, Last, and Page buttons at the top of the window to move forward and backward through the report pages.
11. Click the Print button to print the report.
12. Click the Close button to exit the preview window and return to the Operations Management main menu.
13. Click the New button to view a new copy of the same preview window.

Figure 30 - Nutrition Education Monitoring

Fields

Output Device - The user may select (from a drop-down list): display (window), file, or printer.
**Filename** - If file is selected as the output device, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Local Agency - Clicking on this drop-down list allows the user to select one or all agencies on which to report.

Clinic - Clicking on this drop-down list allows the user to select one or all clinics on which to report.

Dates from - The user enters the earliest date on which the report is to select records.

Thru - The user enters the latest date on which the report is to select records.

Producing an Outreach/Referral Organization Listing Report

To Produce an Outreach/Referral Organization Listing Report:

1. Click Outputs on the Operations Management main menu.
2. Click Reports. The sub-menu is displayed.
3. Click Outreach Organization Listing as shown below:
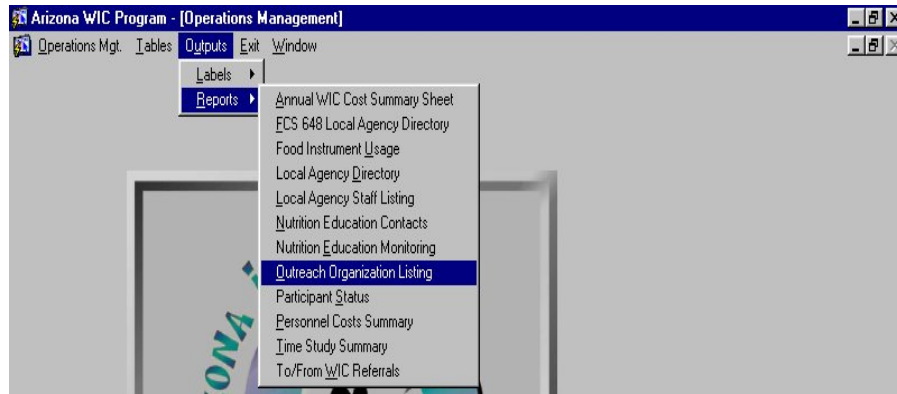
The Outreach/Referral Organization Listing parameter window is displayed:

Figure 31 - Outreach/Referral Organization Listing

Produce an Outreach/Referral Organization Listing Report

1. Click the down arrow in the Output Device field to activate the drop down box. Then select which output device the report is to be sent by clicking once on that device name.
2. TAB to the Filename field. If saving to file, enter the filename for the report.
3. TAB to the Number of Copies field. Type in the number of report copies in this field.

4. After the information has been entered, click the green light icon.
5. If 'display' is selected as the output device, the System displays the preview window shown below. Otherwise, the report is processed per the Output Device selected.

Sample of Outreach/Referral Organization Listing

6. Click the Previous, Next, First, Last and Page icons at the top of the window to move forward and backward through the report pages.
7. Click the Print icon to print the report.
8. Click the Close icon to exit the preview window and return to the Operations Management main menu.
9. Click the New icon to view a new copy of the same preview window.

Figure 31 - Outreach/Referral Organization Listing

Fields

Output Device - The user may select (from a drop-down list): display (window), file or printer.
Filename - If file is selected as the output device, the directory and filename are entered.
Number of Copies - Select number of copies to print.

Producing a Time Study-Summary Report

To Produce Time Study-Summary Report:

1. Click Outputs on the Operations Management main menu.
2. Click Reports. The sub-menu is displayed.
3. Click Time Study-Summary as shown:
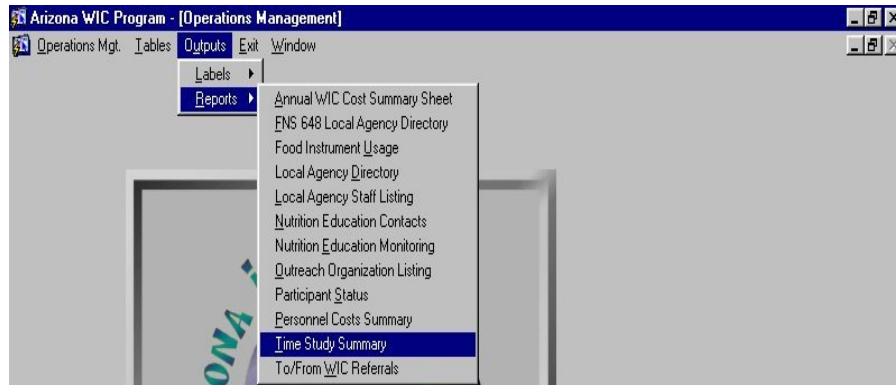
The Time Study-Summary parameter window is displayed:

Figure 32 - Time Study-Summary

Produce Time Study-Summary Report

1. Click the down arrow in the Output Device field to activate the drop down box. Then select which output device the report is to be sent by clicking once on that device name.
2. TAB to the Filename field. If saving to file, enter the filename for the report.

3. TAB to the Number of Copies field. Type in the number of report copies in this field.
4. TAB to the Local Agency field and select the Local Agency for which the report is to be generated.
5. TAB to the Clinic field and select the clinic for which the report is to be generated.
6. TAB to the Staff field and select the staff person for whom the report is to be generated.
7. TAB to the Fiscal year and enter the four-digit year for which the report is to be generated.
8. After the information has been entered, click the green light icon.
9. If 'display' is selected as the output device, the System displays the preview window shown below. Otherwise, the report is processed per the Output Device selected.
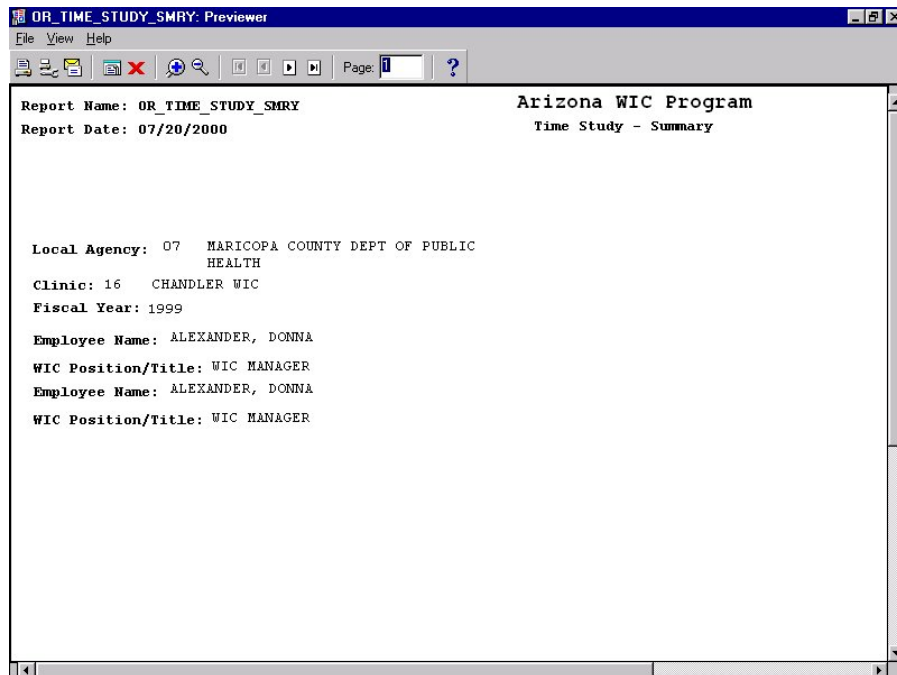
Sample of Outreach Organization Listing

10. Click the Previous, Next, First, Last, and Page icons at the top of the window to move forward and backward through the report pages.
11. Click the Print icon to print the report.
12. Click the Close icon to exit the preview window and return to the Operations Management main menu.
13. Click the New icon to view a new copy of the same preview window.

Figure 32 - Time Study-Summary

Fields

Output Device - The user may select (from a drop-down list): display (window), file, or printer.
Filename - If file is selected as the output device, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Local Agency - Clicking this drop-down list allows the user to select whether to report on all Local Agencies or a specific Local Agency.
Clinic - Clicking this drop-down list allows the user to select whether to report on a single or all clinics within a Local Agency (if a specific Local Agency is selected).

Staff - Clicking this drop-down list allows the user to select whether to report on all staff or a specific staff member within a Local Agency (if a specific Local Agency is selected).

Fiscal Year - The four-digit user-entered fiscal year on which the report is to be generated.

Producing To/From WIC Referrals Reports

To Produce a To/From WIC Referrals Report:

1. Click Outputs on the Operations Management main menu.
2. Click Reports. The sub-menu is displayed.
3. Click To/From WIC Referrals as shown:
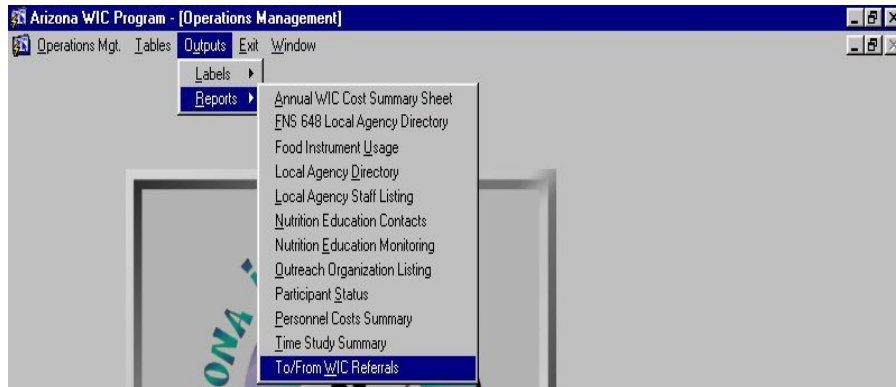
The To/From WIC Referrals parameter window is displayed:

Figure 33 - To/From WIC Referrals

Produce a To/From WIC Referral Report

1. Click the down arrow in the Output Device field to activate the drop down box, then select
   the output device the report is to be sent by double clicking on that device name.
2. TAB to the Filename field. If file is selected as the output device, enter the filename for the
   report.

3. TAB to the Number of Copies field. Type in the number of report copies desired in this field.
4. TAB to the Reporting Level field and select the report level from the drop-down list.
5. TAB to the Referral Months From field and enter the beginning month on which the System is to query records for the report.
6. TAB to the Thru field and enter the last month on which the System is to query records for the report.
7. After the information has been entered, click the green light icon.
8. If 'display' is selected for the output device, the System displays the preview window shown below. Otherwise, the report is processed per the Output Device selected.

***need sample report **(NOT AVAILABLE YET)**

Sample of To/From WIC Referral Report

9. Click the Previous, Next, First, Last and Page icons at the top of the window to move forward and backward through the report pages.
10. Click the Print icon to print the report.
11. Click the Close icon to exit the preview window and return to the Operations Management main menu.
12. Click the New icon to view a new copy of the same preview window.

Figure 33 - To/From WIC Referrals

Fields

Output Device - The user may select (from a drop-down list): display (window), file, or printer.
Filename - If file is selected as the output device, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Reporting Level - The level of reporting to be selected.
Referral Dates From - The user enters the beginning date on which the report is to query records, falling either on or after this date. This field is mandatory.
Thru - The user enters the ending date on which the report is to query records, falling either on or before this date. This field is mandatory.

List of Figures